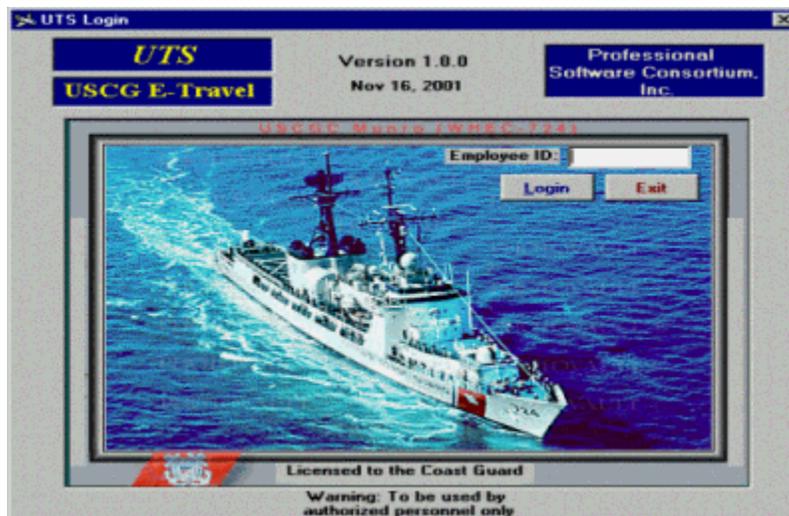


PROFESSIONAL
SOFTWARE
CONSORTIUM, INC.

UTS

UNIT
TRAVEL
SYSTEM

USER GUIDE



17 June 02

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UTS User Guide written by David O. Farris.

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UTS Overview

About UTS

The Unit Travel System, (UTS) is a Windows ® based application developed by **Professional Software Consortium** to serve as a **TDY** and **PCS voucher preparation** system for the U.S. Coast Guard. In addition, UTS can be used to create **Travel Authorizations, Travel Orders**, and prepare **Requests for Advances** of travel expenses.

Travel Authorizations, Advance Requests and Settlement Requests are created either by the individual **Traveler** or a designated **Proxy**. Once an authorization or request is created, the transaction is **transferred** to an **Authorizing Official** for approval.

Approved Settlement Requests are initially submitted to the travel claims processing office and then imported into the Integrated Automated Travel System (**IATS**) for computation.

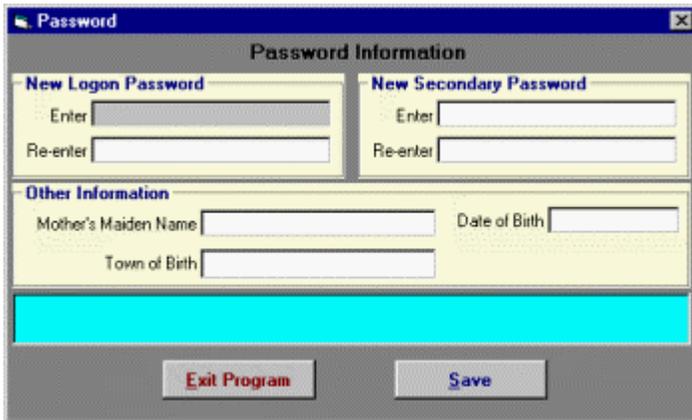
Logging into UTS

In order to use the UTS program, all users must **login** to the program using a valid **Employee ID** and **Password**. For initial logins, however, there are **two** situations that could apply:

- The user account was created **systemically** by **importing** the **personnel** file
- The user account was created by the **System Administrator**

Login Procedures if Account was Imported:

1. At the UTS login screen **enter** your **social security number**. If UTS recognizes the SSN, the **UTS Login** pop-up appears stating that the user must create a **UTS Password** and **fill in other personal information**.
2. **Click** on **OK** to continue and the **Password Information** screen appears.



3. At this screen **enter** the following information. Refer to the **links** under the heading “**See Also**” below if additional instructions are needed:

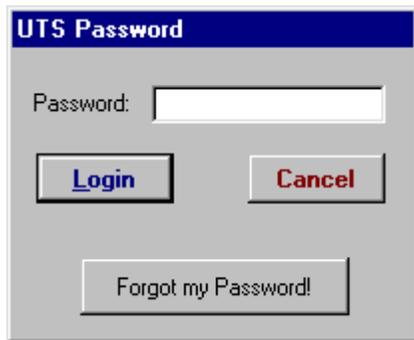
-
- New Logon Password
 - New Secondary Password
 - Mother's Maiden Name
 - Date of Birth
 - Town of Birth

Tip: Passwords must be (8) characters. In addition, (2) of the characters must be **numeric**

4. After entering this information, **click** the **Save** button. The **UTS Request Status** screen appears.

Login Procedures if Account Created by System Administrator:

1. At the **UTS Login** screen, **enter** the **Employee ID** that was created by the System Administrator. If UTS recognizes the Employee ID, the **UTS Password** screen appears.



2. At this screen, **enter** the **Password** that was created by the System Administrator. The **UTS Request Status** or **UTS Requests Requiring Action** screen will appear if the Employee ID and Password was entered correctly.
3. If you don't remember your password, **click** the **Forgot my Password** button. The **Password Information** screen appears requiring you to enter **authentication information**. Refer to the [links](#) **Forgot my Password** and **Authentication Information** listed below, under the heading "**See Also**, for additional instructions, if needed.
4. Since passwords should only be known by the user, after logging in, the user should **change** his/her **passwords**.

See Also

[New Logon Password](#)

[New Secondary Password](#)

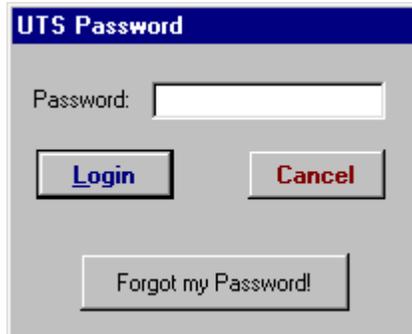
[Authentication Information](#)

[Forgot my Password](#)

[Changing Passwords](#)

Forgot my Password

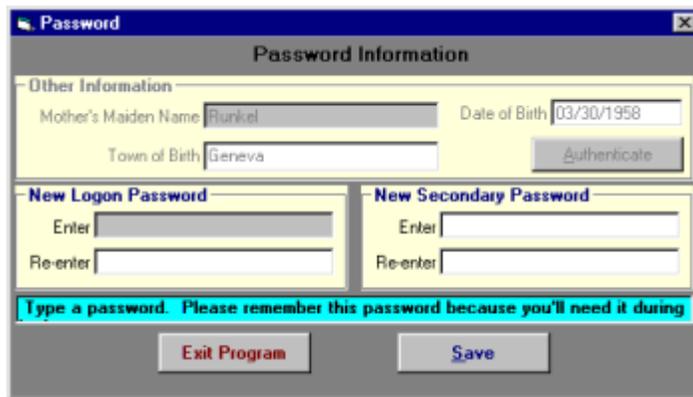
When logging into UTS, the user must first enter a valid **Employee ID**. If UTS recognizes the Employee ID, the **UTS Password** screen appears.



The screenshot shows a dialog box titled "UTS Password". It contains a "Password:" label followed by a text input field. Below the input field are two buttons: "Login" and "Cancel". At the bottom of the dialog is a button labeled "Forgot my Password!".

At this screen the user is required to enter a valid **password**, which has been previously established. If unable to remember the password, however, the user must **click** the **Forgot my Password** button.

After clicking the Forgot my Password button, the **Password Information** screen appears.



The screenshot shows a dialog box titled "Password Information". It is divided into several sections. The "Other Information" section contains three text input fields: "Mother's Maiden Name" (with "Runkel" entered), "Date of Birth" (with "03/30/1958" entered), and "Town of Birth" (with "Geneva" entered). An "Authenticate" button is located to the right of these fields. Below this are two sections for password creation: "New Logon Password" and "New Secondary Password". Each section has two input fields labeled "Enter" and "Re-enter". At the bottom, there is a blue highlighted instruction: "Type a password. Please remember this password because you'll need it during". Below the instruction are two buttons: "Exit Program" and "Save".

At this screen, the user must **enter** the following information:

- Mother's Maiden Name
- Date of Birth
- Town of Birth

After entering the required information, the user must now **click** the **Authenticate** button. If the information entered **matches** the **authentication information** in the UTS database, the **New Logon** and **Secondary Password** sections are displayed.

The user must now **enter** a new Logon and Secondary password.

When **finished** entering the new passwords, the user must **click** the **Save** button. The **UTS Request Status** or **UTS Requests Requiring Action** screen appears.

See Also

[Logging into UTS](#)

[New Logon Password](#)

[New Secondary Password](#)

Entering Dates

Dates can be entered into the UTS program using the following formats:

- **MMDD Format:** For example; to enter the date February 1st, type **0201** and press *Enter*. UTS will automatically default to the current year. The date will be displayed as **02/01/2002**, if the current year is 2002.
- **MMDDYY Format:** For example; to enter the date February 1st, 2002, type **020102** and press *Enter*. The date will be displayed as **02/01/2002**.
- **Pop-up Calendar:** Users can also enter dates by using the built-in calendar that appears when **double clicking** on a date field.



The calendar defaults to the current month and **year**. Ensure that these are correct. If not, **click** on the **arrow** in either of these fields to display a listing of **months** or **years**, then **point** and **click** on the desired choice. After ensuring that the month and year is correct, **point** and **click** on the correct **date** to make a selection.

Entering Amounts

Amounts can be entered into the UTS program using the following formats:

- **With Decimal Point:** If entering a number that involves cents, such as, \$200.50, type **200.50** and press *Enter*. The amount will be displayed as **200.50**.
- **Without Decimal Point:** If entering a whole number, such as, \$200.00, type **200** and press *Enter*. UTS automatically enters the decimal and displays the amount as **200.00**

Entering Accounting

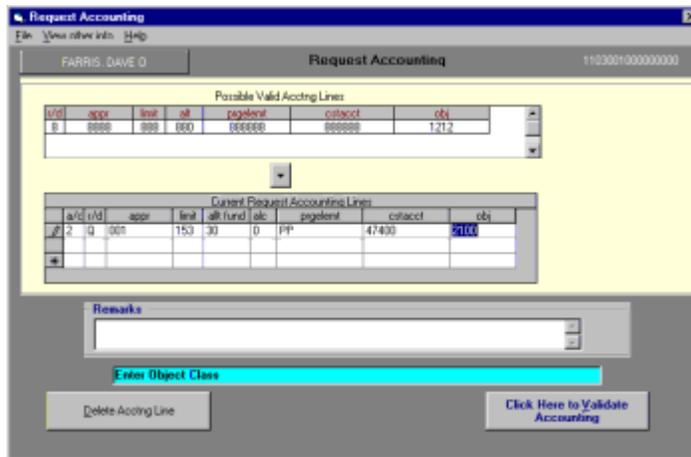
When creating a travel **authorization, order, advance, or settlement**, an accounting appropriation should be added. This is necessary to determine whether funds are available and to charge the expenditures to the appropriate organization.

 **Use the following procedures to add an accounting appropriation:**

Regardless of which travel action is being processed, there will always be a **Modify Acctng** button on the input screen.



1. **Click** on this button to bring up the **Request Accounting** screen.



2. At this screen, perform one of the following actions:

- **Enter Appropriations**
- **Select a RAN Code**
- **Enter Accounting Remarks**

 **Complete the following steps to Add an Appropriation:**

Current Request Accounting Lines									
	a/c	r/d	appr	limit	all fund	alc	p/elemt	cstacct	obj
2	0	001		153	30	0	PP	47400	2101
*									

1. **Click** in the **r/d** field and **enter** the appropriate information.
2. Press **Enter** or **Tab** to advance to the next accounting field and enter the appropriate information.
3. When finished populating all of the required fields, **click** on the **Validate Accounting** button.
4. After clicking on the **Validate Accounting** button, a prompt may appear stating that you must select a **RAN** number. If so, **click** the **OK** button.

-
5. A drop down listing of **RAN codes** now appears on the right side of the **Request Accounting** screen. **Click** on the *Up/Down* **arrows** to navigate the listing and **click** on the desired **RAN code** to make a selection.
 6. After selecting a RAN code, **click** on the **Validate Accounting** button to complete the process and return to the previous input screen.

Complete the following steps to Add Accounting Remarks:

On occasion, it may be beneficial add a remark when entering the accounting data to a travel request. It might be necessary to explain why an appropriation was created or modified. Accounting **Remarks** can be added by using the following procedures:

1. At the **Request Accounting** screen, there is a **Remarks** box displayed just below the **Current Request Accounting Lines** table. **Click** inside of the box.
2. **Type** the desired **remarks**.
3. **Click** the **Validate Accounting** button to complete the process and return to the previous input screen.

Entering Remarks

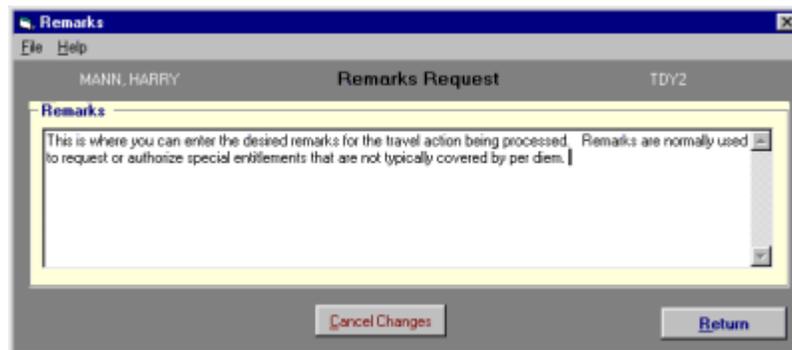
When creating a travel **authorization, order, advance, or settlement**, it may be necessary or beneficial to add some remarks to the travel action.

Use the following procedures to add Remarks:

Regardless of which travel action is being processed, there will always be a **Remarks** button on the input screen.



1. **Click** this button to access the **Settlement or Advance Request Remarks** screen.



2. At this screen you will find a **Remarks** text box. **Type** the desired remarks in this box.
3. When finished entering remarks, **click** the **Return** button to return to the previous input screen.

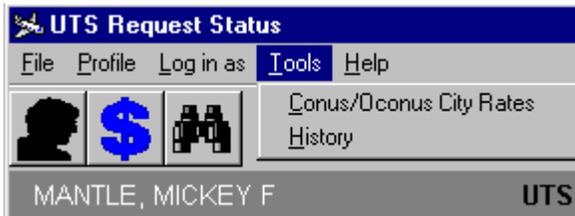
Rates Look-Up

While using UTS, it may be necessary to **lookup the locality per diem rate** for a particular location. This can be accomplished a variety of ways.

 **Complete the following steps to Lookup Locality Per Diem Rates:**

There are **three** methods that can be used to lookup locality per diem rates. The method used however, depends on which input screen is currently displayed.

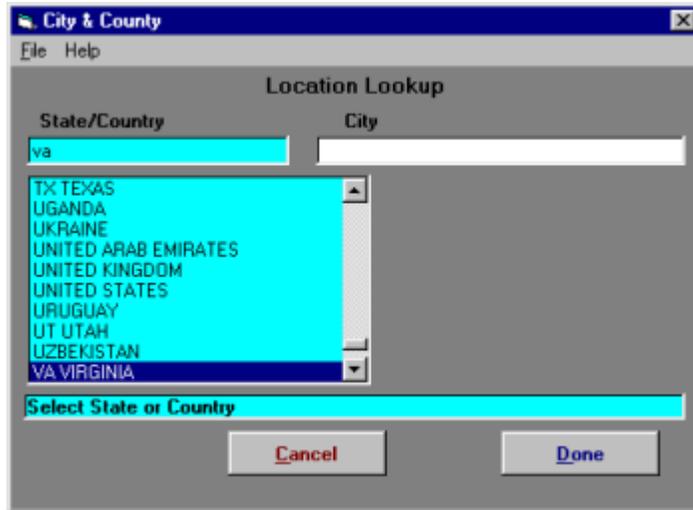
1. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, use one of the following methods to access the locality per diem rates:
 - **Method 1:** - Click on the dollar sign (\$) button.
 - **Method 2:** - Click on the **Tools** menu, then click on the **CONUS/OCONUS City Rates** option.



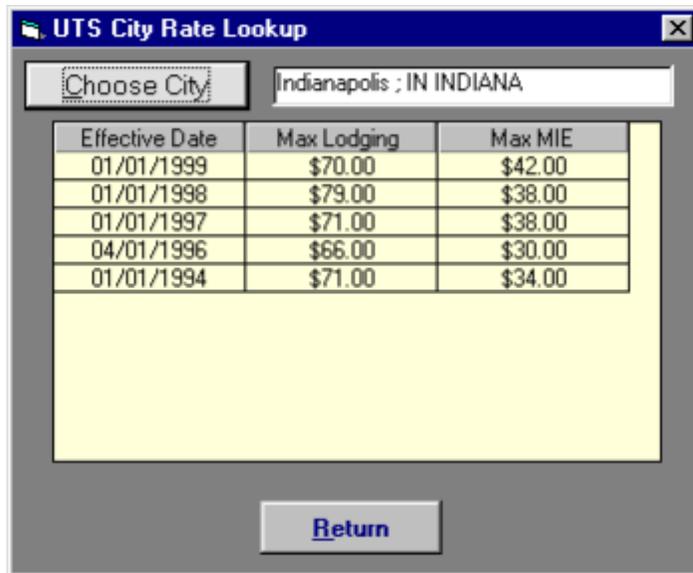
2. **Method 3:** - At the input screens for authorizations, orders, advances, and settlements, click on the **View Other Info** menu and then click on the **Rates** option.



3. After using one of the methods described in items 1 - 3 above, the **Location Lookup** screen appears.



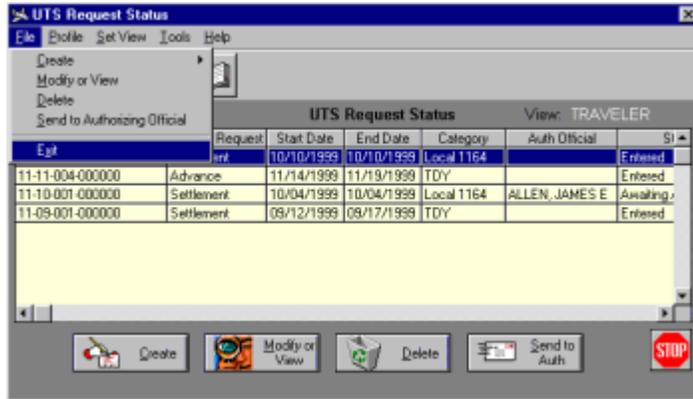
4. At the **State/Country** field, type the first letter of the state or country then click the *Up/Down arrows* until the desired name is displayed. **Click** on the **name** to select.
5. At the **City** field, type the first two letters of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** the *Up/Down arrows* until the desired name is displayed, then **click** on the desired city **name** to select.
6. After selecting a **State/Country** and **City**, the **UTS City Rate Lookup** screen appears displaying the locality rates for the selected city.



7. When finished looking at the locality rates, **click** the **Return** button.

Terminating UTS

When finished using UTS, **return** to the **UTS Request Status** or **UTS Requests Requiring Action** screen and use one of the following methods to terminate the program:



Method 1: - Click the **X** in the top right corner and then **click** on **Yes**.

Method 2: - Click the **File** menu and then **click** the **Exit** option.

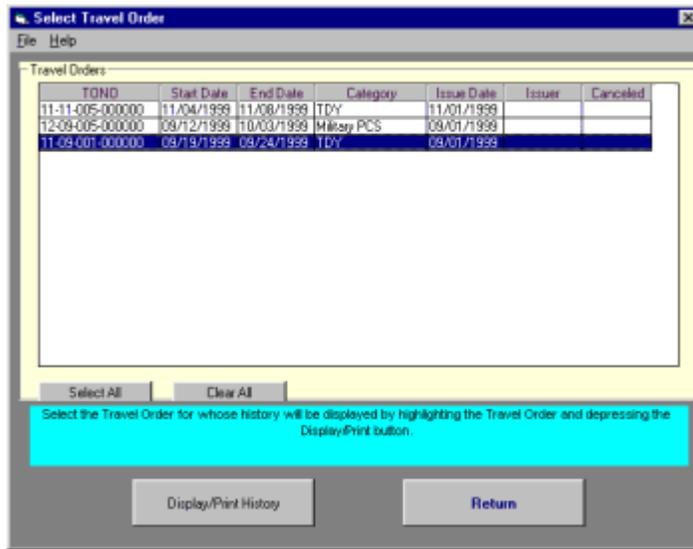
Method 3: - Click on the **Stop** button in the lower right corner.

Travel History

A history record, which may be used by travelers for conducting research, is created for every travel transaction generated by the UTS program.

Accessing the Travel History Record:

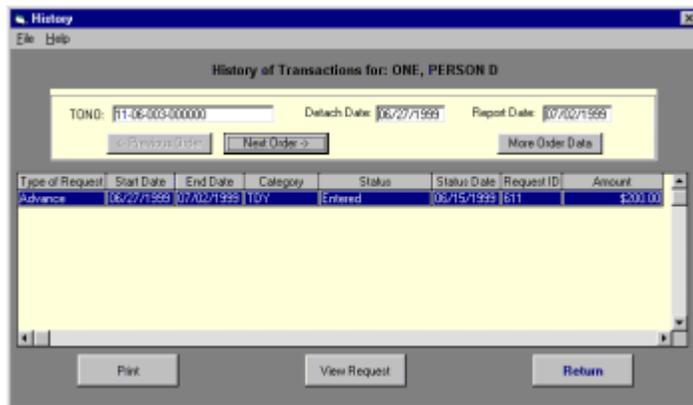
1. Log in to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Tools** menu and then select the **History** option or **click** on the **binoculars** icon. The **Select Travel Order** screen appears.



- At this screen, **point** and **click** on the desired **travel order** number to make a selection. If desired, all of the listed travel orders can be selected by **clicking** on the **Select All** button.

Tip: By first pressing and holding down the **Ctrl** key, the user may select more than one travel order.

- After selecting the desired travel order, **click** the **Display/Print History** button. The **History** screen will appear.



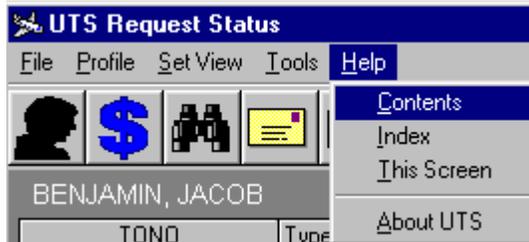
- At the **History** screen, the following options are possible:
 - Previous Order** - If more than one travel order has been selected, **click** on this button to **return** to the previously displayed order.
 - Next Order** - If more than one travel order has been selected, **click** on this button to **advance** to the next available order.
 - More Order Data** - **Click** on this button to **display** the TDY or MILPCS **Travel Order** screen.
 - Print** - **Click** on this button to **generate** a **print-out** of the history record.
 - View Request** - **Click** on this button to **display** the **Local Travel - 1164** screen or the **Request for Advance** or **Settlement** screen.

- **Return - Clicking** on this button **returns** the user to the **Select Travel Order** screen. The user may then select another travel order and display or print the history, or go back to the **UTS Request Status** screen.

UTS Help

A Help System has been included with the UTS program that provides explanations for the numerous program features. In addition, users will find detailed instructions that will guide them through the various functions involved in processing travel claims.

Note: The UTS Help System can be accessed from any screen by **clicking** on the **Help** menu.



After clicking on Help, a drop down menu appears listing the following Help **options**:

- **Contents** - Select this option to see a display of the available topic **categories**.
- **Index** - Select this option to see an **alphabetical listing** of UTS Help topics.
- **This Screen** - Select this option to see a Help topic for the particular **UTS screen** that is currently displayed.
- **About UTS** - Select this option to see a Help topic **describing** the **UTS** program.

Tips for using the UTS online system

When a help window is open, the following options are available:

- Users can **maximize** or **resize** help windows as needed.
- **Click** on the **Help Topics** button to return to screen displaying the **Contents**, **Index**, and **Find** tabs.
- **Click** on the **Print** button to receive a print-out of the topic.
- **Click** on the >> button to advance to the next topic in the browse sequence, or the << button to return to the previous topic.
- **Click** on any word or phrase that is **underlined and highlighted in green** to automatically jump to a topic that describes the underlined item.
- **Click** on a **link** displayed under the heading **See Also** to jump from one topic to another related topic.
- After clicking on a link under the heading, **See Also**, click the **Back** button to return to the previous topic.

See Also

[Contents](#)

[Index](#)

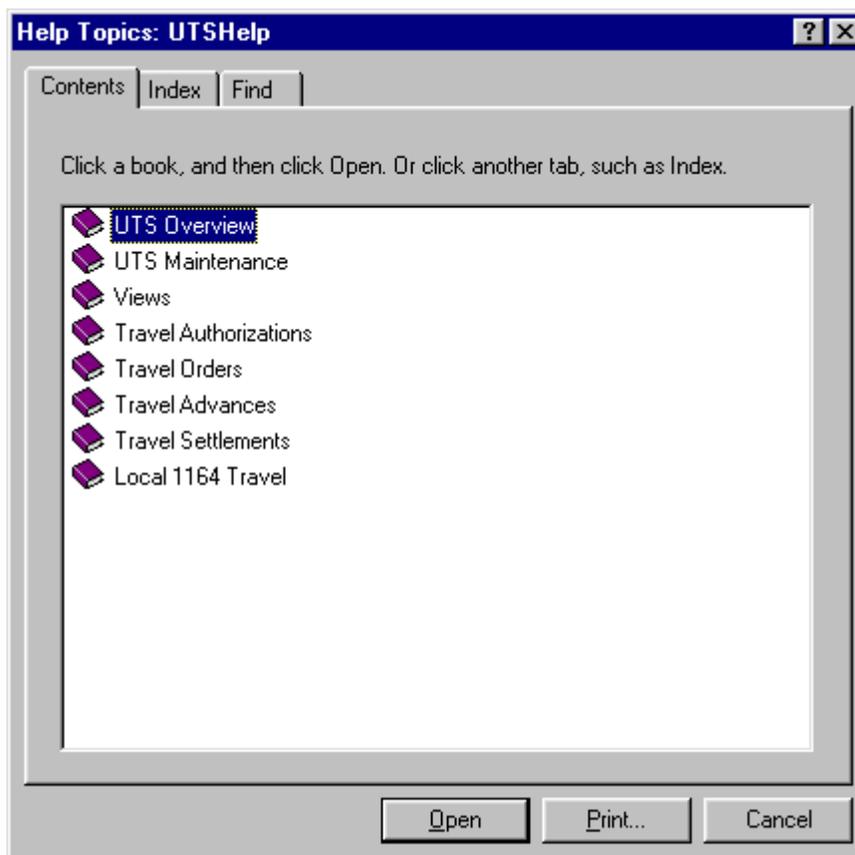
[Find](#)

[This Screen](#)

Help Contents

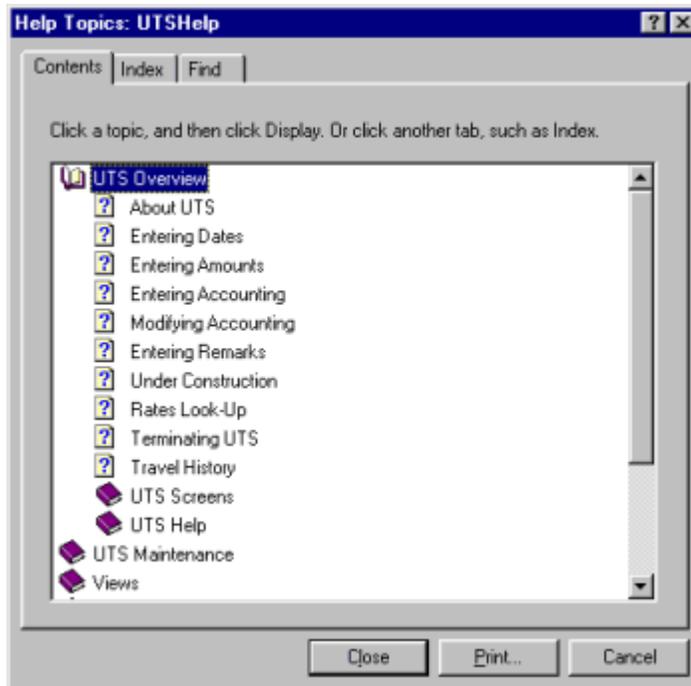
Topics in the UTS Help system are categorized into **Books**. Help Contents Books are displayed two ways:

1. **Click** the **Help** menu at the top of any screen and then **click** on the **Contents** option.
2. **Click** on the **Contents** tab at the **Help Topics** screen.



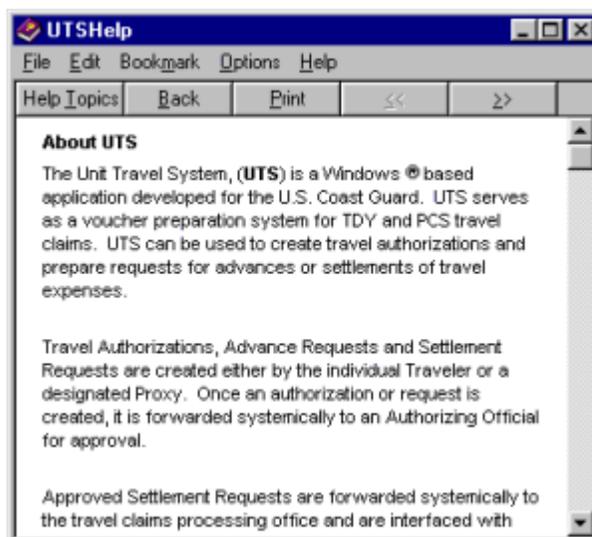
Displaying Help Topics:

1. Point and **click** on a **Book**, then **click** the **Open** button. The Help system will then display Help topics contained within the selected Book.



Tip: Notice that there may be additional **Books** located within a Book.

2. Point and **click** on a **Topic**, then **click** the **Display** button. The Help system will display the contents of the selected topic.



Tips for using the UTS Online Help System

When a help window is open, the following options are available:

- Users can **maximize** or **resize** Help windows as needed.
- **Click** on the **Help Topics** button to return to the screen displaying the **Contents**, **Index**, and **Find** tabs.
- **Click** on the **Print** button to receive a print-out of the topic.
- **Click** on the >> button to advance to the next topic in the browse sequence or the << button to return to the previous topic.
- **Click** on any word or phrase that is **underlined and highlighted in green** to automatically jump to a topic that describes the underlined item.
- **Click** on a **link** displayed under the heading **See Also** to jump from one topic to another related topic.
- After clicking on a link under the heading, **See Also**, click the **Back** button to return to the previous topic.

See Also

[UTS Help](#)

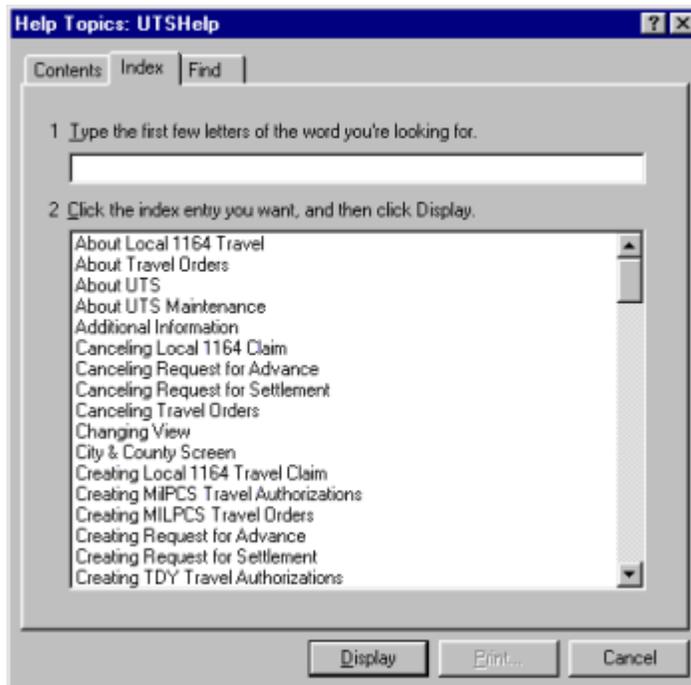
[Index](#)

[Find](#)

[This Screen](#)

Help Index

Topics in the UTS Help system are listed alphabetically in an **Index**. When the **Index** option is selected from the Help drop down menu or when the user clicks on the **Index** tab on the **Help Topics** screen, a listing of the UTS Help topics is displayed.



Use one of the following methods to display Help topics with the Index:

- **Method 1:** - In **block 1**, **type** the first few letters of a Help topic. The Help system will highlight the first topic matching the letters entered. If this is not the desired topic, **click** on the *up/down arrows* on the right side of the Index window to scroll through the listing until the correct topic is **highlighted**. When the desired topic is highlighted, **click** the **Display** button.
- **Method 2:** - **Click** the *up/down arrows* on the right side of the Index window to scroll through the listing. When the desired topic is displayed, **point** and **click** on this topic to **highlight**. When the correct topic is highlighted, **click** the **Display** button.
- **Method 3:** - **Click** the *up/down arrows* on the right side of the Index window to scroll through the listing. When the desired topic is displayed, **point** and **double click** on this topic to display.

When finished viewing a topic, **click** the **Help Topics** button to return to the **Index**.

See Also

[UTS Help](#)

[Contents](#)

[Find](#)

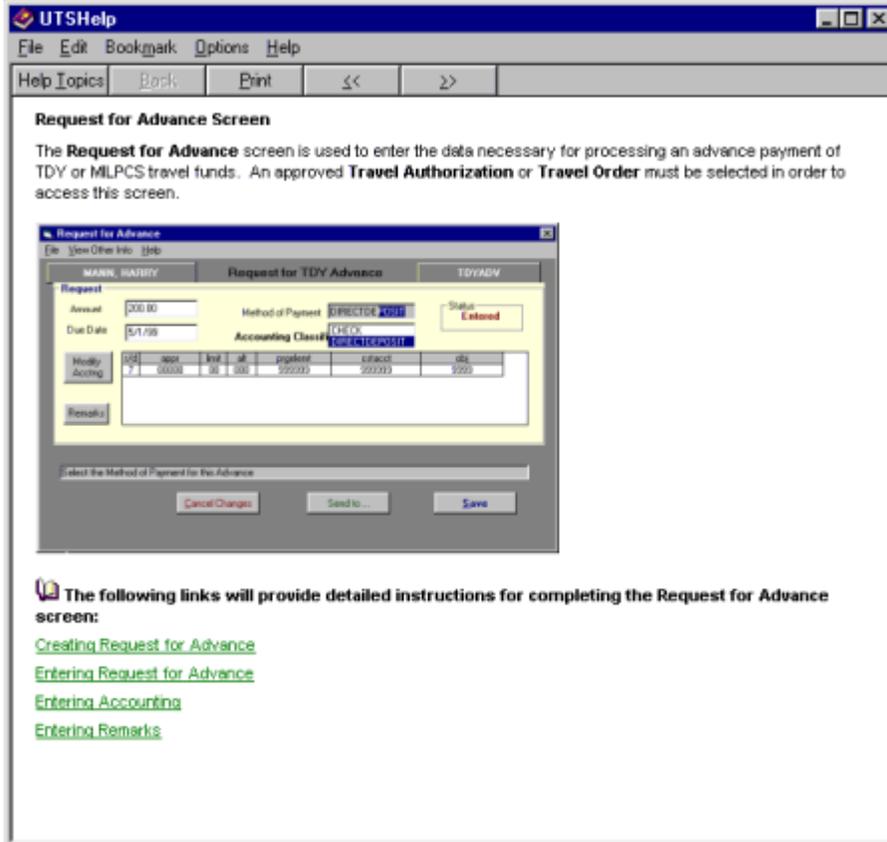
[This Screen](#)

This Screen

A “**This Screen** Help Topic has been created for every UTS screen. These topics were developed to assist individuals who may be new users and don’t understand what a particular UTS screen is used for. A This Screen topic can be accessed by **clicking** on the **Help** menu at the top of any screen and then selecting the **This Screen** option from the drop down menu.



After clicking on the **This Screen** option, the topic for the **current** UTS screen is displayed.



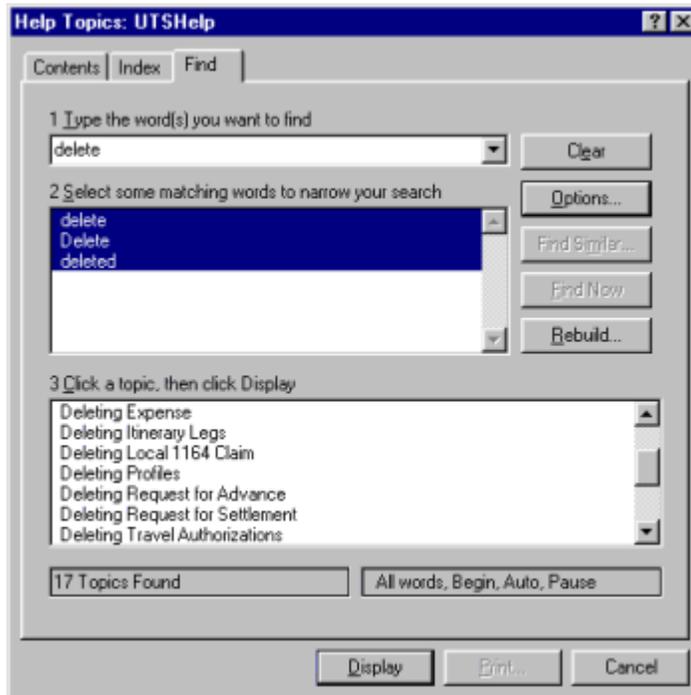
The “**This Screen** topic provides general information about the purpose of the screen and offers links to other topics providing more specific information about using the screen.

Find Help

Another feature of the UTS Help System is a **Find** option to perform a “**Full-Text Search**”. This feature enables the user to search every topic in the Help system for a particular word or phrase. The full-text search only finds topics containing the word or phrase the user is looking for.

Complete the following steps to use the Find option:

1. Click the **Find** tab on the **Help Topics** screen. The following screen appears:



2. At this screen, type a **word** or **phrase** in **block 1**. If the correct option is active, the program will begin the search **automatically** and display the **matches** in **blocks 2** and **3**.
3. **Click** the **up/down arrows** on the **right** side of **block 3** to scroll through the list of topics.
4. **Point** and **click** on a topic to highlight and **click** the **Display** button, or simply **double click** on a topic. The UTS Help System will display the selected topic.

See Also

[UTS Help](#)

[Contents](#)

[Index](#)

[This Screen](#)

Jumps

A **Jump** occurs when a user is viewing a particular help topic and **clicks** on a **word or phrase** that is **underlined** and **highlighted in green**. This action takes the user to a topic describing the word or phrase that was underlined.

UTS Screens

UTS Login Screen

All users of UTS must login to UTS by entering a valid **Employee ID** at the **Login** screen.



At this screen, the user must enter their **Employee ID**, which is most likely their social security number, (SSN), and **press Enter** or **click the Login** button. If the Employee ID is valid, the **UTS Password** screen appears.

User accounts are typically created in the UTS database by importing a personnel information file. If logging into UTS for the first time, users should enter their **SSN** at the **Employee ID** field. The **Password Information** screen appears requiring the user to establish a **Logon** and **Secondary** password.

If the user account was manually created by the **System Administrator**, an **Employee ID** and **Password** was established for the user. The user must enter the **Employee ID** that was created by the SA. After the Employee ID is entered, the **UTS Password** screen appears requiring the user to enter the **password** that was created by the SA.

Note: After the initial login, the user should change the **Logon** and **Secondary Passwords** that were established by the System Administrator.

See Also

[Logging Into UTS](#)

[New Logon Password](#)

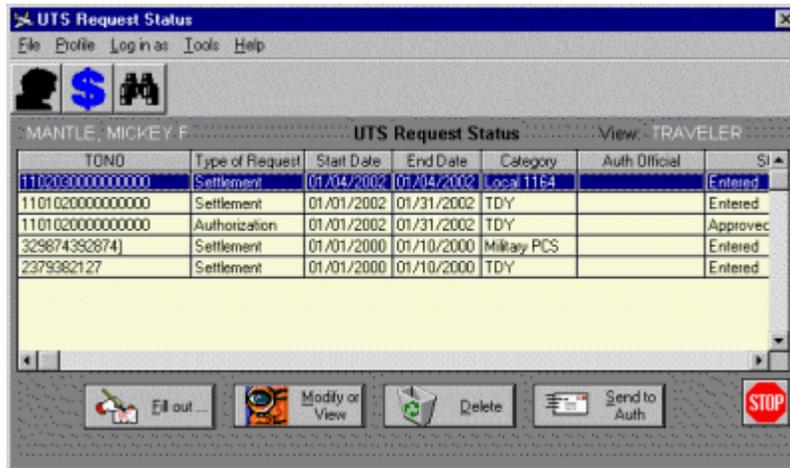
[New Secondary Password](#)

[Changing Passwords](#)

[Forgot My Password](#)

UTS Request Status Screen

When a user logs into UTS in the **Traveler** view, the **UTS Request Status** screen appears. This screen is used to initiate all requests for travel actions and determine the status of these requests. In addition, this screen gives the user the ability to **view, modify, delete, print** or **release** most travel actions.



Along the top of this screen, the user will see the **File, Profile, Log in as, Tools** and **Help** menu selections. If the user **clicks** on any of these items, a drop down menu appears offering additional selections.

Just below the menu selections, the user will find several **icons** that can be used instead of clicking on a menu selection and choosing an option.



If the user positions the mouse pointer on any of these icons, a pop-up **tip** appears explaining the purpose of the particular icon.

The **middle** section of the UTS Request Status screen lists any transactions that are pending follow-up action by the **Traveler**, or **Proxy**, depending on which **view** the user is logged in with. By reviewing this section, the user can easily determine what travel authorizations, orders, or settlement claims have been entered and the status of each of these items.

 **The following functions can be performed from the UTS Request Status screen:**

Travel Authorizations

[Create Travel Authorizations](#)

[View Travel Authorizations](#)

[Modify Travel Authorizations](#)

Delete Travel Authorizations
Release Travel Authorizations

Travel Orders

Create TDY Travel Order
Create MILPCS Travel Order

Travel Advances

Creating Travel Advances
Viewing Travel Advances
Modifying Travel Advances
Deleting Travel Advances
Releasing Travel Advances

Local 1164 Travel

Creating Local 1164 Claim
Viewing Local 1164 Claim
Modifying Local 1164 Claim
Deleting Local 1164 Claim
Releasing Local 1164 Claim

Travel Settlements

Creating Travel Settlements
Viewing Travel Settlements
Modifying Travel Settlements
Deleting Travel Settlements
Releasing Travel Settlements

Profiles

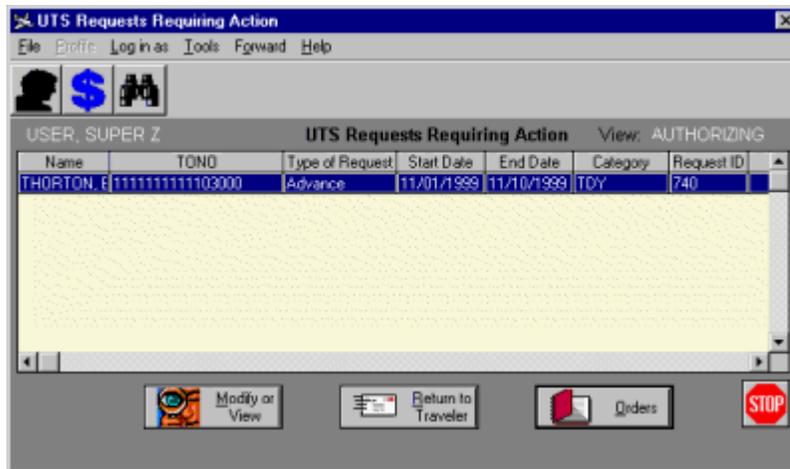
View or Modify Profile
Change View

Tools

Rates Look-Up
Display or Print Travel History
Terminating UTS
Create an Email Message

UTS Requests Requiring Action Screen

When a user logs into UTS in the **Authorizing Official** view, the **UTS Request Requiring Action** screen appears. This screen is used to **approve** travel requests that were initiated by the **Traveler** or **Proxy** and then released to the AO for approval. In addition, this screen gives the AO the ability to **view**, **modify**, or **return** travel requests.



Along the top of this screen, the user will see the **File**, **Profile**, **Log in as**, **Tools**, **Forward** and **Help** menu selections. If the user **clicks** on any of these items, a drop down menu appears offering additional selections.

Just below the menu selections, the user will find several **icons** that can be used instead of clicking on a menu selection and choosing an option.



If the user positions the mouse pointer on any of these icons, a pop-up **tip** appears explaining the purpose of the particular icon.

The **middle** section of the **UTS Requests Requiring Action** screen lists any transactions that are pending approval by the **Authorizing Official**. By reviewing this section, the user can easily determine what travel authorizations, or settlement requests have been received and are requiring approval.

 **The following functions can be performed from the UTS Requests Requiring Action screen:**

Travel Authorizations

- View Travel Authorizations
- Modify Travel Authorizations
- Approving Travel Authorizations
- Returning Travel Authorizations

Travel Orders

- Select a Travel Order
- Viewing Travel Orders
- Modifying Travel orders

Deleting Travel Orders

Travel Settlements

Viewing Travel Settlements

Modifying Travel Settlements

Approving Travel Settlements

Returning Travel Settlements

Profiles

Change View

Tools

Rates Look-Up

Terminating UTS

Create an Email Message

Forwarding Requests

Forward Requests to Another AO

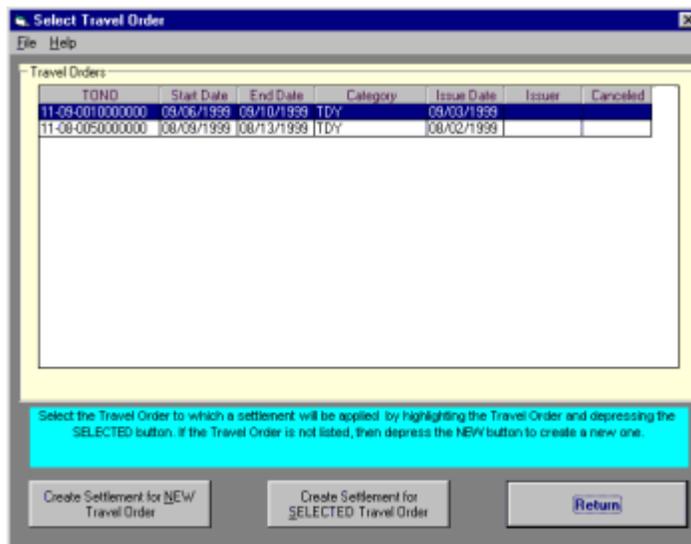
Automatic Forwarding

Manual Forwarding

Select Travel Order Screen

Depending on how this screen is accessed, the Select Travel Order screen allows the user to perform the following actions:

- **Create** a new travel order,
- **View, Modify, or Delete** an existing order
- **Select** an order for processing a request for **Advance** or **Settlement**
- **Display** or **Print** the **History** for a travel order



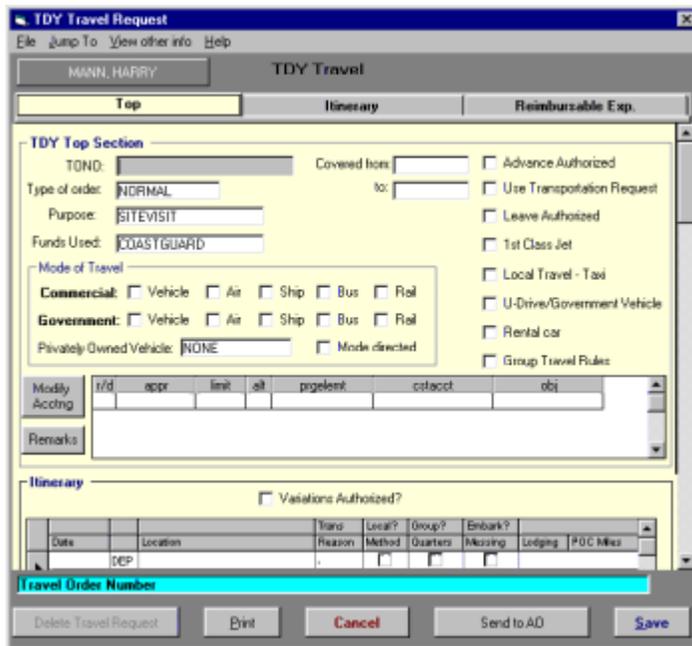
At this screen, any travel orders that have already been created for the traveler will be listed in the middle of the screen. The user can **select** the correct order, then **click** on a **function button** to perform the desired action. If necessary, the user can also click on the **Create New Order** button and create a new order.

 **The following links provide detailed instructions for performing the various functions that can be initiated after accessing the Select Travel Order screen:**

- [Create TDY Travel Order](#)
- [Create MILPCS Travel Order](#)
- [View Travel Orders](#)
- [Modify Travel Orders](#)
- [Delete Travel Orders](#)
- [Create Request for Advance](#)
- [Create Request for Settlement](#)
- [Display or Print Travel History](#)

TDY Travel Request Screen

The TDY Travel Request screen is used to capture the data needed by the Authorizing Official (AO) to approve an authorization for TDY travel. The information collected on this screen provides the AO with the requested trip dates, locations, mode of travel, funding appropriations, and anticipated expenditures.



Date	Location	Reason	Method	Quarters	Mezzing	Lodging	POC Miles
DEP							

Tip: Notice that the TDY Travel Request screen consists of (3) sections; **Top**, **Itinerary**, and **Reimbursable Exp.**

 The following links provide detailed instructions for completing each section of the TDY Travel Request screen:

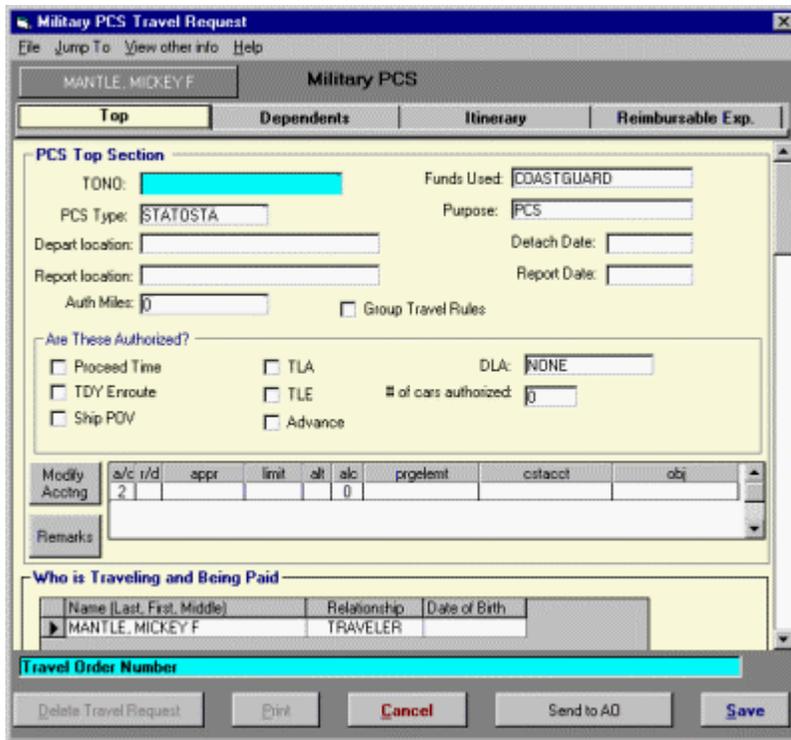
[Top Section](#)

[Itinerary](#)

[Reimbursable Expenses](#)

MILPCS Travel Request Screen

The MILPCS Travel Request screen is used to capture the data needed by the Authorizing Official (AO) to approve an authorization for Military PCS travel. The information collected on this screen provides the AO with the requested travel dates, locations, mode of travel, funding appropriations, dependent information, and anticipated expenditures.



Tip: Notice that the MILPCS Travel Request screen consists of (4) sections; **Top**, **Dependents**, **Itinerary**, and **Reimbursable Exp.**

 The following links provide detailed instructions for completing each section of the MILPCS Travel Request screen:

[Top Section](#)

[Dependents](#)

[Itinerary](#)

[Reimbursable Expenses](#)

Request Accounting Screen

The Request Accounting screen is used to **enter** an accounting appropriation for the request and **add** remarks that pertain to the accounting appropriation.

The screenshot shows the 'Request Accounting' window with the following data:

Possible Valid Accounting Lines							
l/rd	app	line	alt	page/ent	cost/acc	obj	
0	0000	000	000	000000	000000	1212	

Current Request Accounting Lines								
a/rd (rd)	app	line	alt	fund	alt	page/ent	cost/acc	obj
0	0	000		150	30	0	47400	0100

Tip: This screen is separated into three input boxes.

- **Possible Valid Accounting Lines** - This box is located at the **top** of the screen. This section is not in use currently.
- **Current Request Accounting Lines** - This box is located in the **middle** of this screen. This box is used to manually enter an accounting appropriation.
- **Remarks** - This box is located at the **bottom** of the screen. This area is used to capture remarks pertaining to the accounting appropriations entered.

 **The following links provide detailed instructions for completing each section of the Request Accounting screen:**

[Entering an Accounting Appropriation](#)

[Adding Accounting Remarks](#)

Profile Screen

A **Personal Profile** is a user account that is created for every individual who will use UTS and every traveler, who's claim is processed through UTS. The **Profile** screen is used to store **personal, financial** and **security** information, establish **privileges**, and designate the **Authorizing Official** and **Signature Proxy**.

The screenshot shows a 'Profile' window with the following sections:

- Personal Information:**
 - ID: 001011599
 - SSN: 001011599
 - Last Name: CLEMENTS
 - First Name: MISTY
 - Middle Initial: M
 - Grade/Rank: E5
 - Unit: 1166402
 - AD's Unit: 1166402
 - Privilege: TRAVELER
 - Cost Center: 11223
- Home Address:**
 - Number, Street, Apt: 111 E. NORTH ST.
 - Street, etc. line 2: [Empty]
 - City: AUGUSTA
 - State: ME MAINE
 - Zipcode: 11122
 - Phone: 111-222-3333
- Work Address:**
 - Number, Street, Apt: [Empty]
 - Street, etc. line 2: [Empty]
 - City: [Empty]
 - State: [Empty]
 - Zipcode: [Empty]
 - Phone: 111-222-3333

At the bottom, there is a red bar with the text: "Enter the Social Security Number of this individual." Below this are buttons for "Delete", "Cancel", and "Save".

 The following links provide detailed instructions for completing each section of the Profile screen:

- [Personal Information](#)
- [Home Address](#)
- [Work Address](#)
- [Financial Information](#)
- [Security Information](#)

Local Travel -1164 Screen

The Local Travel - 1164 screen is used to enter the information needed to file a settlement claim for the performance of temporary duty **within** the defined **local travel area** of the traveler's official duty station.

The screenshot shows the 'Local Travel - 1164' application window. At the top, the user name 'BENJAMIN, JACOB' is displayed. Below this, there are several input fields: 'TONO' (highlighted in yellow), 'Type of Claim' (set to 'FINAL'), 'Method of Payment' (set to 'DIRECTDEPOSIT'), and 'Funds Used' (set to 'COASTGUARD').

The 'Local Expenses' section contains a table with the following columns: Date, Type of Expense, Claimed, and Location. Below the table are buttons for 'Delete Expense' and 'Insert new Expense'.

The 'Accounting Classification' section features a 'Modify Acctg' button and a table with columns: a/c, r/d, appr, limit, alt, alc, prgelem, catacct, and obj. The 'a/c' field contains the value '2'.

At the bottom, the 'Travel Order Number' section is highlighted in yellow and includes buttons for 'Delete', 'Remarks', 'Print', 'Cancel', 'Send to AD', and 'Save'.

 The following links will provide detailed instructions for completing each section of the Local Travel - 1164 screen:

- [Creating Local 1164 Claim](#)
- [Entering Local 1164 Claim](#)
- [Inserting Expense](#)
- [Deleting Expense](#)
- [Entering Accounting](#)
- [Entering Remarks](#)
- [Canceling Local 1164 Claim](#)
- [Saving Local 1164 Claim](#)
- [Releasing Local 1164 Claim](#)
- [Printing Local 1164 Claim](#)
- [Deleting Local 1164 Claim](#)
- [Viewing Local 1164 Claim](#)
- [Modifying Local 1164 Claim](#)

Request for Advance Screen

The **Request for Advance** screen is used to enter the data necessary for processing an advance payment of TDY or MILPCS travel funds. An approved **Travel Authorization** or **Travel Order** must be selected in order to access this screen.

a/c/t/d	appr	limit	alt	calc	project	cotacct	obj
2	8	9999	888	888	0	888888	8888

 The following links provide detailed instructions for completing the Request for Advance screen:

- [Creating Request for Advance](#)
- [Entering Request for Advance](#)
- [Entering Accounting](#)
- [Entering Remarks](#)

Remarks Screen

When creating a travel **authorization, order, advance, or settlement**, it may be necessary or beneficial to add some remarks to the travel action. This can be accomplished by clicking on the **Remarks** button to access the Remarks screen.

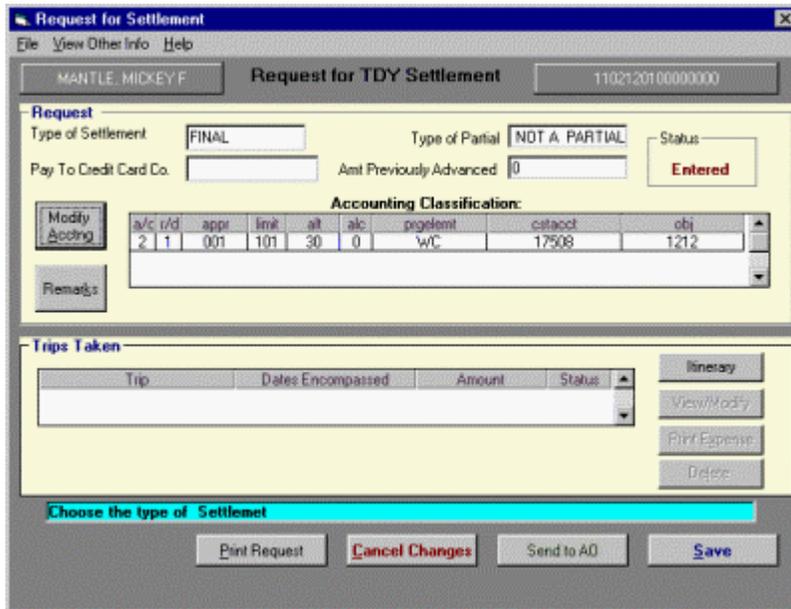
This is where you can enter the desired remarks for the travel action being processed. Remarks are normally used to request or authorize special entitlements that are not typically covered by per diem.

 The following link provides detailed instructions for completing the Remarks screen:

[Entering Remarks](#)

Request for Settlement Screen

The **Request for Settlement** screen is used to enter the data necessary for processing a settlement claim for a completed **TDY** or **MILPCS** trip. An approved **Travel Authorization** or **Travel Order** must be selected in order to access this screen.



The screenshot shows the 'Request for Settlement' window. At the top, it displays 'Request for TDY Settlement' and a user ID '1102120100000000'. The 'Request' section includes fields for 'Type of Settlement' (FINAL), 'Type of Partial' (NOT A PARTIAL), 'Status' (Entered), and 'Amt Previously Advanced' (0). Below this is an 'Accounting Classification' table with columns for a/c, r/d, appr, limit, alt, alc, pgelem, cstaobj, and obj. The table contains one row with values: 2, 1, 001, 101, 30, 0, wC, 17508, 1212. There are also buttons for 'Modify Accounting' and 'Remarks'. The 'Trips Taken' section has a table with columns for Trip, Dates Encompassed, Amount, and Status, and buttons for 'Itinerary', 'View/Modify', 'Print Expense', and 'Delete'. At the bottom, there is a highlighted bar that says 'Choose the type of Settlement' and buttons for 'Print Request', 'Cancel Changes', 'Send to AO', and 'Save'.

 The following links provide detailed instructions for completing the Request for Settlement screen:

[Creating Request for Settlement](#)

[Request for Settlement Itinerary](#)

[Reason for Stop](#)

[Method of Reimbursement](#)

[Request for Settlement Reimb. Expenses](#)

[Entering Accounting](#)

[Entering Remarks](#)

[Exceptions](#)

[Occasional Expenses](#)

[Deleting Request for 1351-2 Settlement](#)

[Canceling Request for 1351-2 Settlement](#)

[Releasing Request for 1351-2 Settlement](#)

[Printing Request for 1351-2 Settlement](#)

- [Saving Request for 1351-2 Settlement](#)
- [Viewing Request for 1351-2 Settlement](#)
- [Modifying Request for Settlement](#)

Trip Screen

The **Trip** screen is used to capture the specific details regarding a completed TDY or MILPCS trip. At this screen, the user must **complete** an **itinerary** and **enter** all of the claimed **expenses**.

The screenshot shows the 'Trip' application window. At the top, there are tabs for 'Top', 'Itinerary', and 'Reimbursable Exp.'. The 'Miscellaneous Questions' section has a checked box for 'Owner operator of P.O.V.' and a text field for 'Duration of TDY travel' containing 'GE24'. The 'Itinerary' section contains a table with the following data:

Date	Location	Trans	Method	Quarters	Mezzing	Lodging	POC Miles
03/01/2002	DEP Indianapolis ; INDIANA	PA		<input type="checkbox"/>			
03/01/2002	ARR Dayton ; OHIO	TD	LDP	OO	CM	\$75.00	120
03/07/2002	DEP Dayton ; OHIO	PA		<input type="checkbox"/>			
03/07/2002	ARR Indianapolis ; INDIANA	MC	-	-	-	\$0.00	120
	DEP	-	-	<input type="checkbox"/>			
	ARR	-	-	-	-	\$0.00	

Below the table are buttons for 'Delete leg', 'Insert Leg', 'Exceptions to Daily Expenses', and 'Occasional Expenses'. At the bottom, there is a question 'Is the traveler the owner operator of the P.O.V.?' and buttons for 'Delete this Voucher', 'Cancel', 'Print', and 'Save'.

Tip: Notice that there are (3) sections to the **Trip** screen; **Top**, **Itinerary**, and **Reimbursable Expenses**. In addition, there are special buttons to access the **Exceptions to Daily Expenses** and **Occasional Expenses** screens.

 The following links provide detailed instructions for completing the Trips screen:

- [Top Section](#)
- [Itinerary](#)
- [Reason for Stop](#)
- [Method of Reimbursement](#)
- [Reimbursable. Expenses](#)
- [Exceptions to Daily Expenses](#)
- [Occasional Expenses](#)

Exceptions Screen

After completing a settlement itinerary, it may be necessary to access the **Exceptions** screen to make **adjustments** to the default values for the **lodging costs** and **meal types**. Or, if Actual Expense (**AE**) was selected for the reimbursement method, then it is necessary to access the Exceptions screen to enter the daily **amounts** for **meals** and **incidental expenses**.

The screenshot shows the 'Exceptions' window for 'MANN, HARRY' on 'TDY2'. It features a 'Daily Exceptions' section with a table of travel dates and locations. Below that is a 'Daily Records' table with columns for Date, Day Type, B-Type, L-Type, D-Type, Lodging, Breakfast, Lunch, Dinner, and Incidental Expenses. At the bottom, there is a 'Lodging cost' field and 'Cancel all changes' and 'Save' buttons.

Arrive Date	Location	Reason For Stop	Lodging	Quarters
02/22/1999	Topeka : KS KANSAS	TD	\$75.00	CQ
02/26/1999	Indianapolis : IN INDIANA	MC	\$0.00	-

Date	Day Type	B-Type	L-Type	D-Type	Lodging	Breakfast	Lunch	Dinner	Incidental Expenses
2/22/99	LDP	CM	CM	CM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2/23/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/24/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/25/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/26/99	LDP	CM	CM	CM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Lodging cost

Cancel all changes Save

 The following link provides detailed instructions for completing the Exceptions screen:

[Entering Exceptions](#)

Occasional Expenses Screen

For certain types of travel situations, **per diem** is not payable. If a traveler is required to use personal funds to purchase **meals** or **lodging**, however, these expenses are considered to be **Occasional Expenses**. Reimbursement for the purchase of occasional expenses typically occur under one of the following circumstances:

- **Round Trip** performed in **12 Hours or Less**
- Duty on board a **Government Ship**
- **Field Conditions**

If one these situations apply, the **Occasional Expenses** screen is used to capture the expenses for lodging and meals purchased by the traveler with personal funds.

 The following link provides detailed instructions for completing the Occasional Expenses screen:

[Entering Occasional Expenses](#)

MILPCS Travel Order Screen

The MILPCS Travel Order screen is used to establish the following details:

- Travel Order Number
- Type of PCS Travel
- Locations of the Old and New PDS
- Authorized Miles
- Agency Funding the Travel
- Purpose of the Travel
- Detach and Reporting Dates
- Order Issue Date
- Group Travel Rules
- Special Authorizations
- Accounting Appropriation
- Dependent Information

This screen must be completed before a **Request for MILPCS Advance** or **Settlement** can be entered.

Note: Information coming from a from an approved hard-copy travel order, that was generated outside of UTS, must be manually entered into this screen by the user. UTS automatically populates this screen, however, for **travel authorizations** that were created with UTS and were approved by an AO.

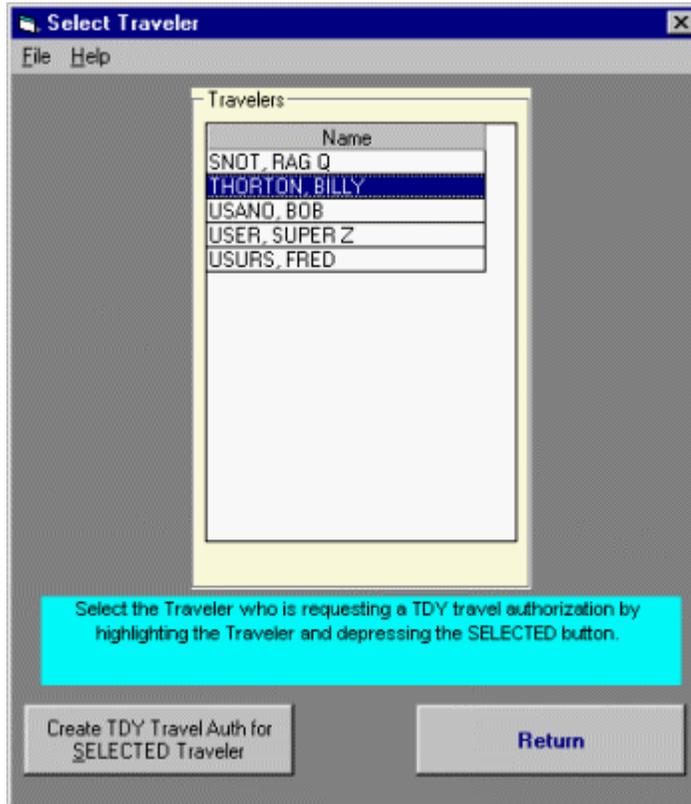
 **The following links provide detailed instructions for completing the MILPCS Travel Order screen:**

- [MILPCS Order - Top Section](#)
- [MILPCS Order - Are These Authorized](#)
- [MILPCS Order - Dependents](#)
- [Entering Accounting](#)
- [Entering Remarks](#)
- [Canceling Travel Orders](#)
- [Saving Travel Orders](#)
- [Deleting Travel Orders](#)
- [Viewing Travel Orders](#)
- [Modifying Travel Orders](#)

Select Traveler Screen

The **Select Traveler** screen appears whenever an individual is logged into UTS in the **Proxy** View, and **creates** one of the following travel actions on behalf of another person:

- **Request for TDY Travel Authorization**
- **Request for Military PCS Travel Authorization**
- **Local 1164 Claim**



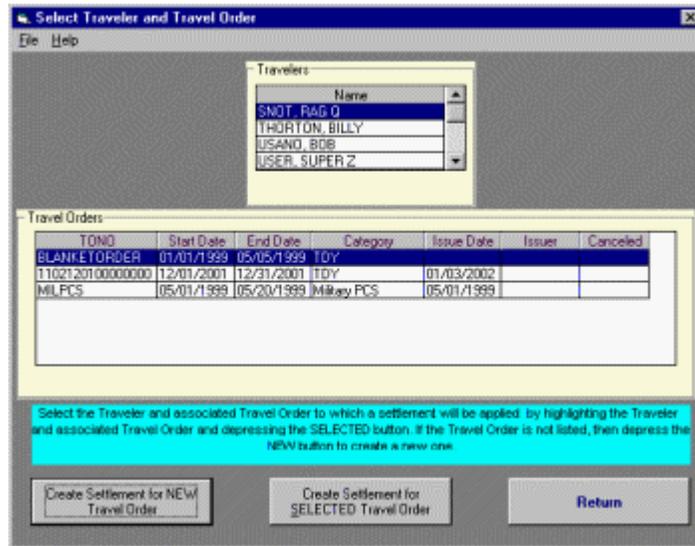
Note: The Proxy and the personnel listed on this screen are both assigned to a **unit** sharing the same **OPFAC number**.

The purpose of this screen is to allow the **Proxy** to select the individual that the travel action is being created for. When this screen appears, the Proxy should **point** and **click** on the **desired name**, then **click** on the appropriate **action button** at the bottom of the screen.

Tip: The action button available will depend on which **create** option was selected.

Select Traveler and Travel Order Screen

The **Select Traveler and Travel Order** screen appears when a user is logged into UTS as a **Proxy** and a Request for **Advance** or **Settlement** is created on the behalf of another person. This screen is used to select the specific traveler and travel order that will be used for the transaction.



The table at the top of this screen lists all of the **traveler's** the Proxy may process transactions for. **Point** and **click** on the desired name, and the table at the bottom lists all travel **orders** existing in the database for the selected traveler.

Point and **click** on the desired **order**, then **click** on the appropriate **action button** at the bottom of the screen.

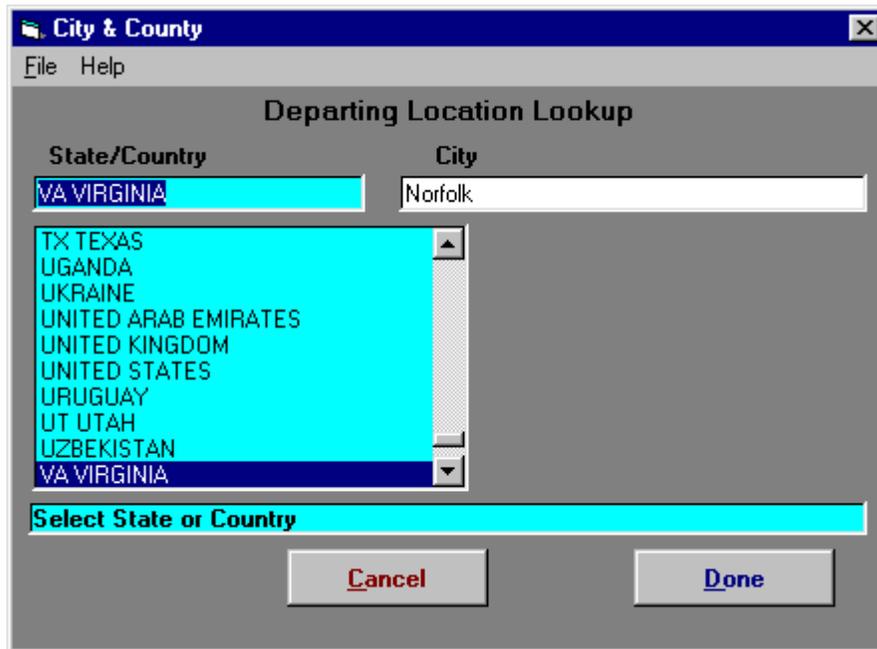
Note: The action button available will depend on which **create** option was selected.

See Also

- [Creating TDY Travel Orders](#)
- [Creating MILPCS Travel Orders](#)
- [Creating Request for Advance](#)
- [Creating Request for Settlement](#)

City & County Screen

The **City & County** screen appears when clicking on the **Tools** menu from the **UTS Request Status** or **Requests Requiring Action** screen and selecting the **CONUS/OCONUS City Rates** option. This screen also appears when completing an **itinerary** and accessing the **Location** field, or clicking on the **Choose City** button.



When this screen is displayed, the user must first select a **state** or **county** by entering the **first two letters** of the state or country name and then **pointing** and **clicking** on the desired choice from the listing.

After selecting a state or country, the user must also use the same procedure to select a **city** name.

See Also

[Rates Look-Up](#)

[UTS City Rate Lookup Screen](#)

UTS City Rate Lookup Screen

This screen lists the **per diem rates**, by **effective date**, for the city selected. If you wish to look the rates up for another city, **click the Chose City button**.

Effective Date	Max Lodging	Max MIE
01/01/1999	\$70.00	\$42.00
01/01/1998	\$79.00	\$38.00
01/01/1997	\$71.00	\$38.00
04/01/1996	\$66.00	\$30.00
01/01/1994	\$71.00	\$34.00

 The following links provide detailed instructions for looking up City Rates:

[Rates Look-Up](#)

[City & County Screen](#)

History Screen

The **History** screen is used to provide historical information for **research** and **inquiry** purposes. By accessing this screen, the user can view **travel order information** and **travel settlement information**. In addition, the user can also generate a **print-out** of the historical record for a single order or all of the existing orders.

Type of Request	Start Date	End Date	Category	Status	Status Date	Request ID	Amount
Advance	06/27/1999	07/02/1999	100Y	Entered	06/15/1999	611	\$400.00

At this screen, the user has the following options:

- **Previous Order** - If more than one travel order has been selected, **click** on this button to **return** to the previously displayed order.
- **Next Order** - If more than one travel order has been selected, **click** on this button to **advance** to the next available order.
- **More Order Data** - **Click** on this button to **display** the TDY or MILPCS Travel Order screen.
- **Print** - **Click** on this button to generate a **print-out** of the history record.
- **View Request** - **Click** on this button to display the **Local Travel - 1164** screen or the **Request for Advance** or **Settlement** screen.
- **Return** - Clicking on this button returns the user to the **Select Travel Order** screen. The user may then select another travel order, display and print the history, or go back to the **UTS Request Status** screen.

See Also

[Travel History](#)

Authorizing Official Reassignment Screen

When user accounts are created in UTS, a default Authorizing Official (AO) is established for the purpose of approving travel **authorizations**, **advances** and **settlements**. If a particular AO will be unavailable to approve the requested action, however, a **substitute** AO can be assigned. This is accomplished by accessing the UTS Maintenance Module and displaying the **Authorizing Official Reassignment Screen**.

Unit: 1166402

Please enter at least the first 2 characters for either the Name or ID:

Name	ID
USANO, BOB	666666666
USER, SUPER Z	000000000

Reassign Requests Previous Screen

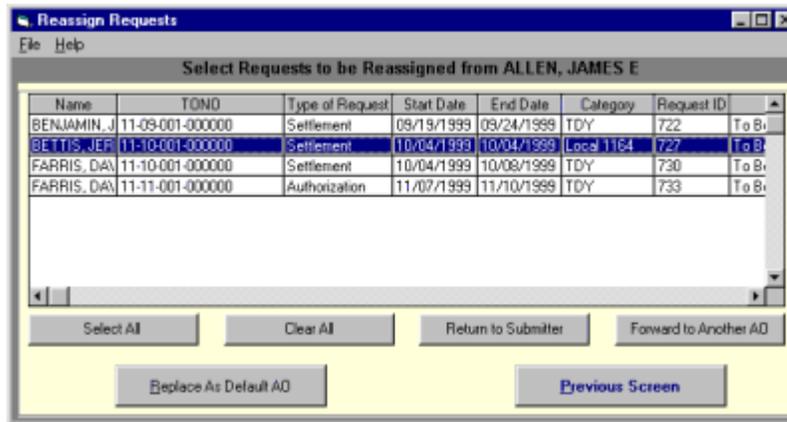
At this screen, the user must **select** the **AO**, who will have their pending travel actions reassigned to **another** AO.

 **The following link provides detailed instructions for reassigning an AO:**

[Reassigning Authorizing Official](#)

Reassign Requests Screen

The **Reassign Requests** screen is the next screen to appear after having selected an **AO** at the **Authorizing Official Reassignment** screen and clicking the **Reassign Requests** button.



At this screen, the travel requests pending approval by the AO selected at the Authorizing Official Reassignment screen are displayed. The user must **select** the desired travel **request** and then **click** on the appropriate **action button** at the bottom of the screen.

 **The following link provides detailed instructions for reassigning requests:**

[Reassigning Authorizing Official](#)

Forward Claims to Selected AO Screen

After selecting a travel request at the **Reassign Requests** screen the **Forward Claims to Selected AO** screen appears when the **Forward to Another AO** button is clicked.

Forward Claims to Selected AO

File Help

Select Authorizing Official To Whom Requests for JONES, MARY Q Should Be Forwarded

Please enter at least the first 2 characters for either the Name or ID

Name: ID:

22

ID	Name
222222222	SMITH, JOHN W

JOHN W Cancel

At this screen the user must select the AO, who will receive the reassigned transaction.

 The following link provides detailed instructions for forwarding claims to another AO:

[Reassigning Authorizing Official](#)

Replacement AO Screen

The **Replacement AO** screen appears after clicking on the **Replace as Default AO** button at the **Reassign Requests** screen.

ID	Name
222222222	SMITH, JOHN W

At this screen the user must select the AO who will **replace** the **original** default AO. After selecting a new AO and clicking the **Replace as Default AO** button, this new AO becomes the default AO for all travelers, who previously had the **replaced** AO selected as their default AO.

 **The following link provides detailed instructions for replacing a default AO:**

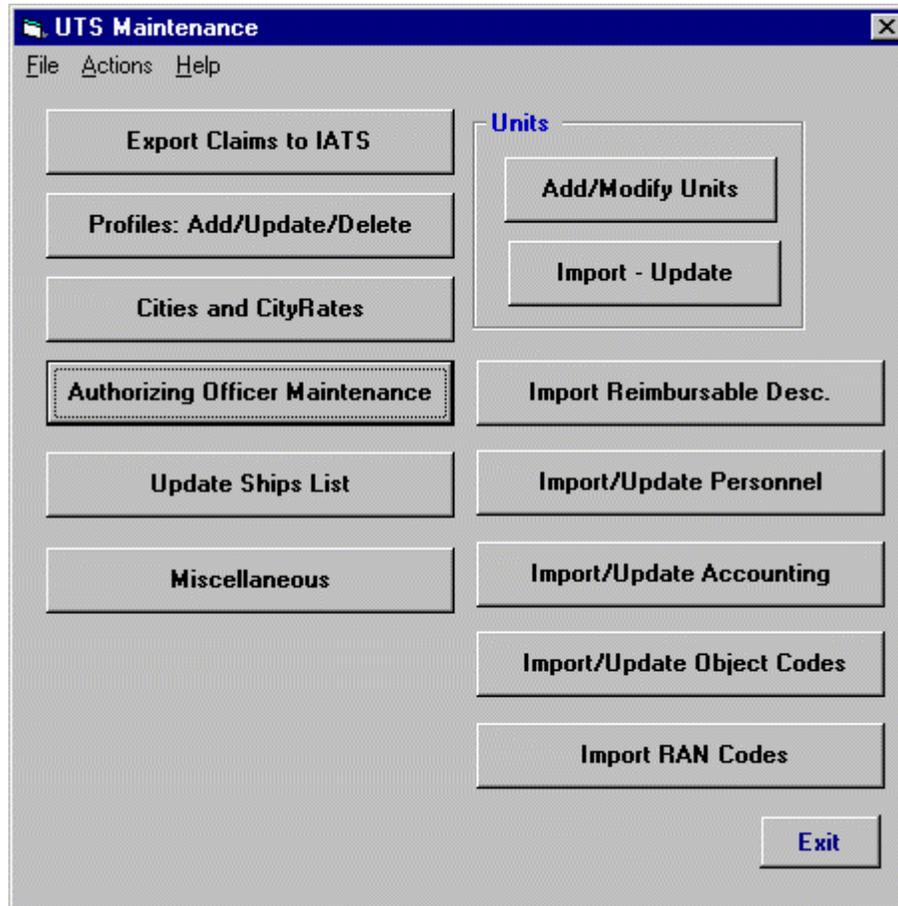
[Reassigning Authorizing Official](#)

UTS Maintenance Screen

The **UTS Maintenance** screen is the **main menu** screen for the UTS Maintenance Module. From this screen, the **System Administrator** can perform the following actions:

- **Create the IATS Interface File**
- **Maintain User Accounts**
- **Maintain City Names and Rates**
- **Reassign Authorizing Officials**
- **Maintain Ships Table**

- **Maintain Miscellaneous Parameters**
- **Maintain Units**
- **Maintain Reimbursable Expense Table**
- **Import Personnel Data**
- **Import Accounting Data**



 **The following links provide detailed instructions for performing the various functions available from the Maintenance Module:**

- [Exporting Claims](#)
- [Maintaining User Accounts](#)
- [Maintaining City Names and Rates](#)
- [Reassigning Authorizing Officials](#)
- [Maintain Ships Table](#)
- [Maintain Miscellaneous Parameters](#)
- [Maintaining Units](#)
- [Importing Unit Data](#)
- [Importing Reimbursable Exp. Descriptions](#)
- [Importing Personnel Data](#)

[Importing Accounting Data](#)

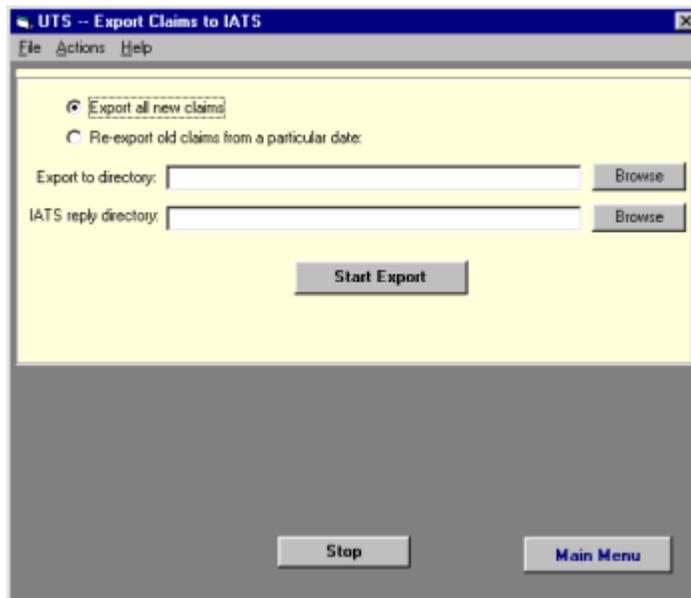
[Importing Object Codes](#)

[Importing RAN Codes](#)

UTS Export Claims Screen

The **UTS Export Claims** screen is used to perform the following actions:

- Specify the **type of claims** to export
- Specify the **location** where the **UTS Export File** will reside
- Specify the **location** where the **IATS Reply File** will reside
- Create the **UTS Export File**



Once the correct configuration information is entered, the user can click the **Start Export** button to create the export file.

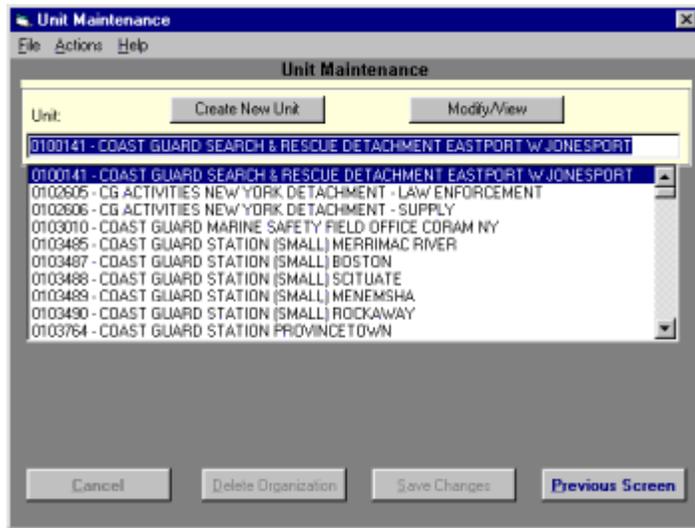
 **The following link provides detailed instructions for completing the UTS Export Claims screen:**

[Exporting Claims](#)

Unit Maintenance Screen

All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned an **Unit Number**.

Unit information is stored in the **UTS Maintenance Module** and can be **added, modified, or deleted** by accessing the UTS Maintenance Module and clicking on the **Add/Modify Units** button. After clicking this button, the **Unit Maintenance** screen appears.



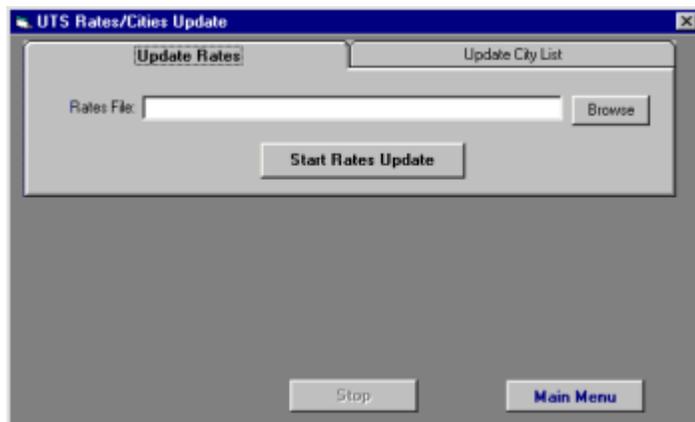
Use this screen to add, modify, or delete unit information.

 The following link provides detailed instructions for maintaining the Unit Table:

[Maintaining Unit Table](#)

UTS Rates/Cities Update Screen

CONUS and OCONUS locality **City Names** and **Per Diem Rates** are stored in the **UTS Maintenance Module**. The maintenance tables storing these names and rates must be continually updated to ensure that travel claims are accurately processed. This is accomplished by accessing the UTS Maintenance Module and displaying the **UTS Rates/Cities Update Screen**.



 The following links provide detailed instructions for looking up locality per diem rates and updating the UTS Rates/Cities tables:

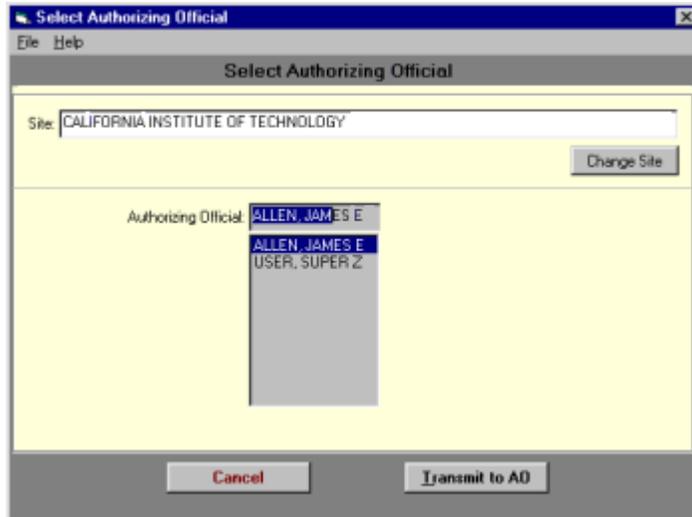
[Rates Look-Up](#)

[City & County Screen](#)

[Maintaining Cities and City Rates](#)

Select Authorizing Official Screen

All requests for **Travel Authorizations**, **Advances**, and **Settlements** must be forwarded to a designated Authorizing Official for approval. After completing a travel action, and the **Send to AO** button has been selected, the **Select Authorizing Official** screen appears for the purpose of designating the desired AO.



At this screen, users may also select a different site and display a new listing of Authorizing Officials.

 **The following link provides detailed instructions for completing the Select Authorizing Official screen:**

[Releasing Travel Authorizations](#)

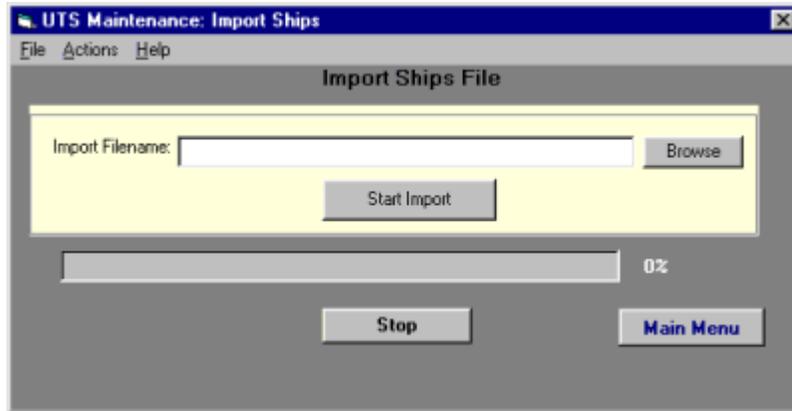
[Releasing Advances](#)

[Releasing Settlements](#)

Import Ships Screen

The UTS database includes a table that contains names of ships belonging to the US Coast Guard. The information stored in this table is used to identify the traveler's assigned vessel. This table is **populated** and **updated** by **importing** a file that contains the ship information.

To automatically update the **Ships List**, access the UTS Maintenance Module and **click** the **Update Ships List** button. The **Import Ships** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the ships information. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

 **The following link provides detailed instructions for importing the Ships file:**

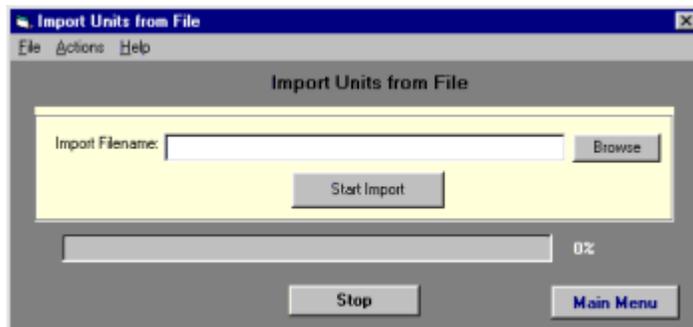
[Maintaining Ships Table](#)

Import Units Screen

All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned an **Unit Number**.

Unit information is stored in the **Unit Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically by PMIS-JUMPS.

To automatically update the **Unit Table** by processing an interface file, access the UTS Maintenance Module and **click** the **Import - Update** button. The **Import Units from File** screen appears.



Use this screen to enter the unit **filename** and **path**, or **search** for the unit file. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

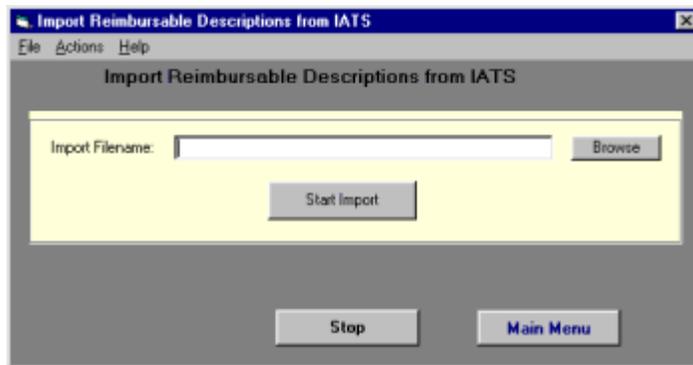
 **The following link provides detailed instructions for importing the Unit Data File:**

[Importing Unit Data File](#)

Import Reimbursable Description Screen

Reimbursable Expense Descriptions are stored in the **Reimbursable Expense Table** which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated by **IATS**.

To automatically update the **Reimbursable Expense Table** by processing an interface file, access the UTS Maintenance Module and **click** the **Import Reimbursable Desc.** button. The **Import Reimbursable Descriptions from IATS** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the reimbursable expense descriptions. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

 **The following link provides detailed instructions for importing the Reimbursable Expenses Description File:**

[Importing Reimbursable Expense Descriptions](#)

Import Personnel Screen

User accounts in the UTS database are automatically added and updated by importing a file containing personnel information.

To automatically update the **Personnel Data**, access the UTS Maintenance Module and click the **Import/Update Personnel** button. The **Import Personnel** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the personnel information. Once the filename and path is entered, the user can **click** the **Start Import** button to begin the import process.

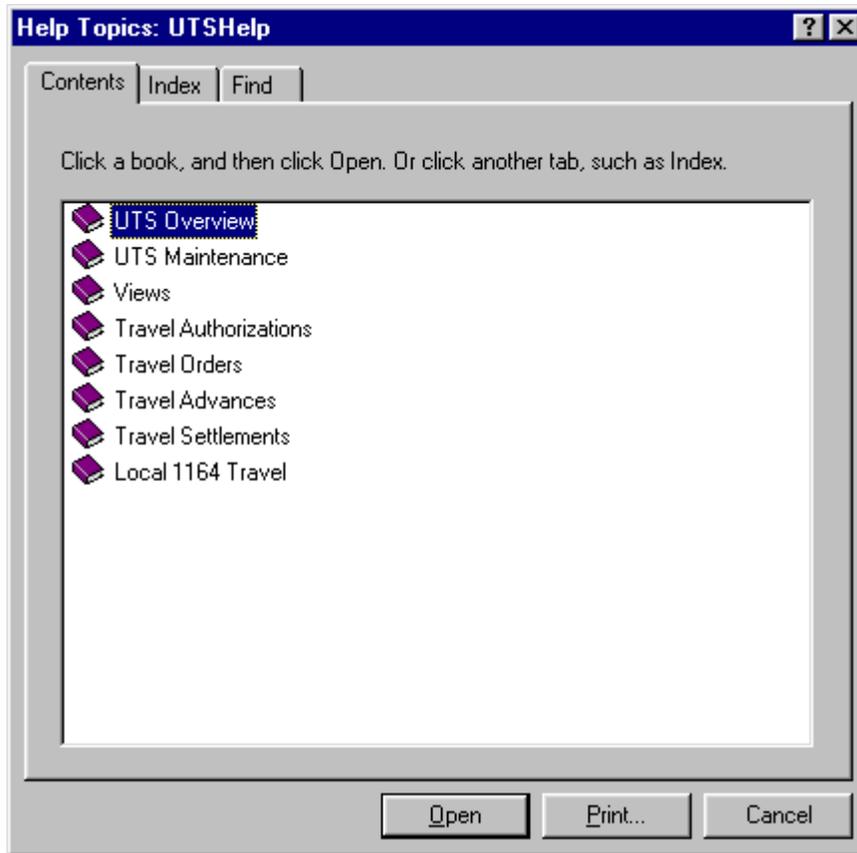
 **The following link provides detailed instructions for importing the Personnel file:**

[Importing Personnel Data File](#)

Help Topics Screen

A Help System has been included with the UTS program that provides explanations for the numerous program features. In addition, users will find detailed instructions that will guide them through the various functions involved in processing travel claims.

The UTS **Help Topics** screen is displayed when a user **clicks** on the **Help** menu at the top of any UTS screen, then selects the **Contents**, or **Index** option.



At this screen the user can display help topics by using the **Contents**, **Index**, or **Find** options. Help topics may also be **printed** from this screen if desired.

 **The following links provide detailed instructions for using the Help Topics screen:**

[Contents](#)

[Index](#)

[Find](#)

Security Information Screen

The Security Information screen is used to capture the information needed to grant **access** and **privileges** to UTS users. In addition, this screen is used to establish the user's default **Authorizing Official** and to designate a **Signature Proxy**.

The screenshot shows a web application window titled "Profile - Security Options" for user "FARRIS, DAVID O". The main content area is titled "Security Information" and contains several sections:

- Privileges:** Two checkboxes, "Authorizing Official" and "Systems Administrator", both of which are currently unchecked.
- New Logon Password:** Two input fields labeled "Enter" and "Re-enter", both containing masked characters (dots).
- New Secondary Password:** Two input fields labeled "Enter" and "Re-enter", both containing masked characters (dots).
- Authentication Information:** Three input fields: "Mother's Maiden Name" (with a red error message below it), "Date of Birth", and "Town of Birth".
- Additional Information:** Four input fields: "Default Authorizing Officer" (filled with "ALLEN, JAMES E"), "Signature Proxy" (filled with "BETTIS, JEROME"), "Office Email Address", and "Home Email Address".

At the bottom of the form area, a red error message states: "Please enter your mothers maiden name." Below the form are two buttons: "Cancel" and "Previous Screen".

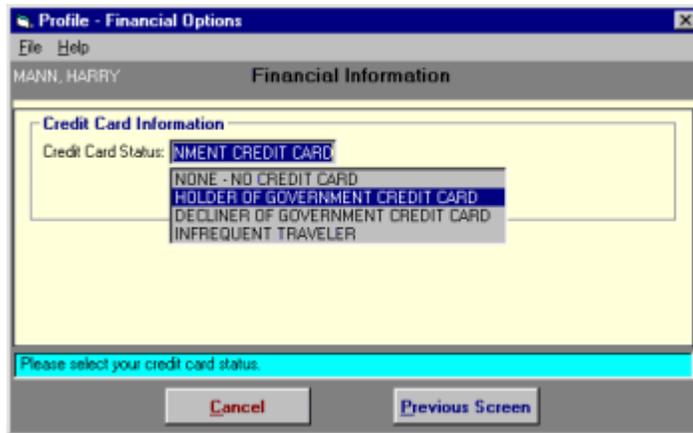
 The following links provide detailed instructions for completing the Security Information screen:

- [Creating Profiles](#)
- [Privileges](#)
- [Logon Password](#)
- [Secondary Password](#)
- [Authentication Information](#)
- [Additional Information](#)

Financial Information Screen

The Financial Information screen is used to establish whether the traveler possesses a Government issued Charge Card.

The Financial Information screen can be accessed by users in the **Traveler** View mode only. To access this screen, the user must first access the **Personal Profile** screen and then **click** the **Financial** button. The following screen will appear:



At this screen, the user can select or change the existing **Credit Card Status**.

 **The following link provides detailed instructions for completing the Credit Card Information section:**

[Credit Card Information](#)

Forward Requests Screen

If an AO knows that he/she will be **unavailable** to process travel requests during a certain period, UTS provides a feature that allows the AO to **forward** requests to **another** AO.



The **Forward Requests** screen is used to **select** which AO the selected request will be forwarded to.

 **The following links provide detailed instructions for Forwarding Requests to another AO:**

[Forwarding Requests](#)

[Automatic Forwarding](#)

TDY Travel Order Screen

The **TDY Travel Order** screen is used to establish the following details:

- **Travel Order Number**
- **Type of Travel Order**
- **Purpose of the Trip**
- **Funding Organization**
- **Period Covered**
- **Order Issue Date**
- **Authorized Mode of Transportation**
- **Special Authorizations**
- **Accounting Appropriation**
- **Special Remarks**

The screenshot shows the 'TDY Travel Order' window with the following details:

- TDY Top Section**
- TOND: 11-11-002-000000
- Covered from: 11/14/1999 to: 11/19/1999
- Type of order: NORMAL
- Purpose: SITEVISIT
- Funds Used: COASTGUARD
- Issue Date: 11/03/1999
- Mode of Travel:
 - Commercial: Vehicle, Air, Ship, Bus, Rail
 - Government: Vehicle, Air, Ship, Bus, Rail
 - Privately Owned Vehicle: NONE, Mode directed
- Special Authorizations:
 - Advance Authorized
 - Use Transportation Request
 - Leave Authorized
 - 1st Class Jet
 - Local Travel - Taxi
 - U-Drive/Government Vehicle
 - Rental Car
 - Group Travel Rules
 - Phone calls Authorized
- Modify Acctg table:

a/c	r/d	appr	limit	alt	alc	prselem	ctfacct	obj
2	8	9888	888	888	0	888888	888888	8888
- Remarks: [Empty field]
- is a rental car authorized? [Highlighted in cyan]
- Buttons: Delete Travel Request, Print, Cancel, Save

This screen must be completed before a **Request for TDY Advance** or **Settlement** can be entered.

Note: Information coming from a from a pre-existing hard-copy TDY travel order, that was generated outside of UTS, must be manually entered into this screen by the user. UTS automatically populates this screen, however, for **travel authorizations** that were created with UTS and were approved by an AO.

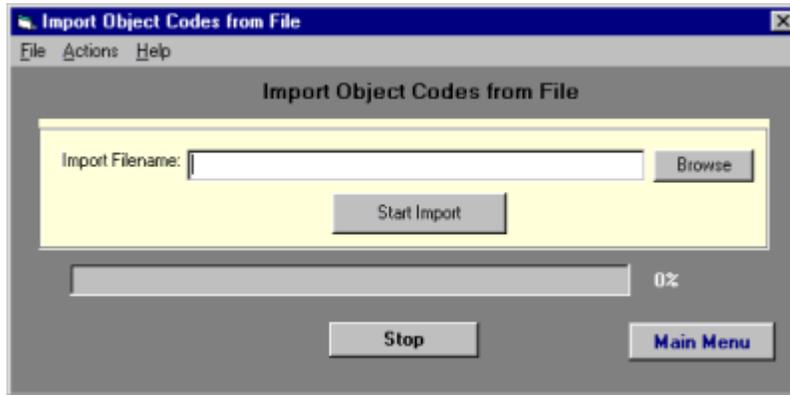
 **The following link provides detailed instructions for completing the TDY Travel Order screen:**

[Completing the TDY Travel Order screen](#)

Import Object Codes from File Screen

Object Classification codes are stored in the **Object Codes Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically by FINCEN.

To automatically update the **Object Codes Table** by processing an interface file, access the UTS Maintenance Module and **click** the **Import/Update Object Codes** button. The **Import Object Codes from File** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the Object codes. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

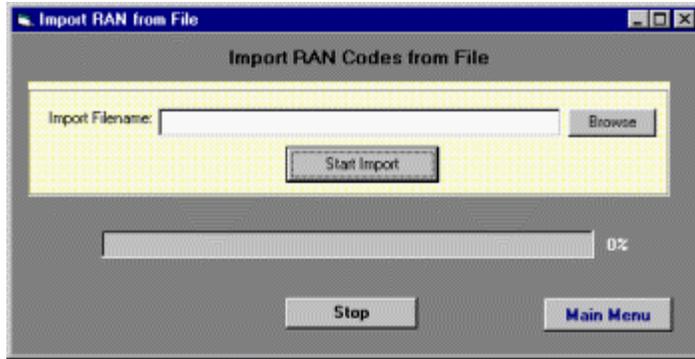
 **The following link provides detailed instructions for importing the Object Codes File:**

[Importing Object Codes](#)

Import RAN from File Screen

Reimbursable Agreement Number (**RAN**) codes are stored in the **RAN Codes Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically by FINCEN.

To automatically update the **RAN Codes Table** by processing an interface file, access the UTS Maintenance Module and **click** the **Import RAN Codes** button. The **Import RAN from File** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the RAN codes. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

 **The following link provides detailed instructions for importing the RAN Codes File:**

[Importing RAN Codes](#)

Import Accounting File Screen

Accounting Strings are stored in the **Accounting Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically by FINCEN.

To automatically update the **Accounting Table** by processing an interface file, access the UTS Maintenance Module and **click** the **Import/Update Accounting** button. The **Import Accounting File** screen appears.



Use this screen to enter the **filename** and **path**, or **search** for the file containing the Accounting Strings. Once the filename and path is entered, the user can click the **Start Import** button to begin the import process.

 **The following link provides detailed instructions for importing the Accounting Strings File:**

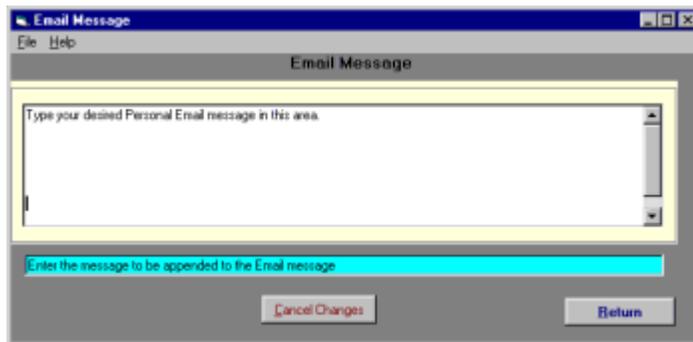
[Import Accounting Strings](#)

Email Message Screen

A new feature has been added to UTS that allows a **Traveler, Proxy** or **AO** to send an **E-mail** message to each other to notify the recipient that a **Request for Authorization, Settlement, or Advance** was forwarded. When this new feature is used, UTS **automatically** generates an E-mail message containing information pertaining to the **Traveler's ID, Travel Order Number** and the **Trip Dates**.

In addition, the user may also include a **Personal Email Message** if additional information is needed. UTS automatically appends this message to the system-generated message when a **Request for Authorization, Settlement, or Advance** is forwarded.

The **Email Message** screen, displayed below, is the screen used when creating a personal message to be added to the system-generated message:



 The following link provides detailed instructions for using the UTS Email feature:

- [Set-up Email Address](#)
- [Create Personal Message](#)
- [Sending Email](#)

This page intentionally left blank. Please use it for notes.

UTS Maintenance

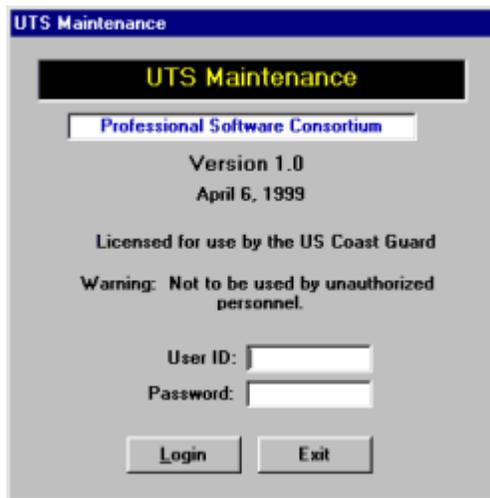
About UTS Maintenance

The UTS Maintenance module is used to perform a variety of functions that are restricted to users with **System Administrator** privileges. After logging into the UTS Maintenance module, the user has the ability to perform the following actions:

- **Export travel claims from UTS to IATS for computation**
- **Create, modify, and delete user profiles**
- **Maintain per diem rates and city names**
- **Reassign travel requests from one Authorizing Official to another**
- **Import data files containing ship information**
- **Establish Miscellaneous Parameters**
- **Modify or delete unit information**
- **Import data files containing unit information**
- **Import data files containing reimbursable expense information**
- **Import data files containing personnel information**
- **Import data files containing accounting appropriations**

Maintenance Login

Access to the UTS Maintenance module is limited to users with **System Administrator** privileges.



UTS Maintenance

UTS Maintenance

Professional Software Consortium

Version 1.0
April 6, 1999

Licensed for use by the US Coast Guard

Warning: Not to be used by unauthorized personnel.

User ID:

Password:

Login Exit

- **User ID** - At this field, the System Administrator must **type** his/her assigned **Employee ID** number and press *Enter*.
- **Password** - At this field, the System Administrator must **type** his/her assigned **Password** and press *Enter* or **click** on the **Login** button.

See Also

[About UTS Maintenance](#)

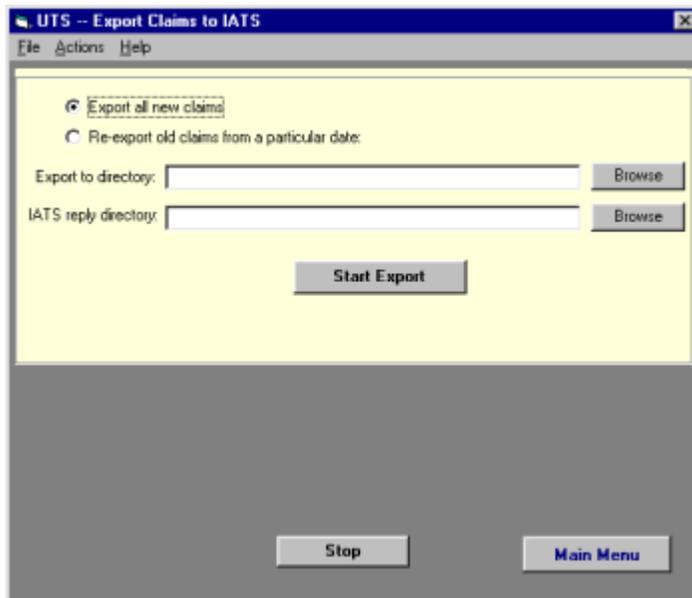
-
- About System Administrators
 - New Logon Password
 - Changing Passwords

Exporting Claims

After a Request for **Advance** or **Settlement** has been **approved** by the Authorizing Official, an **export** file must be created. The export file can then be **imported** into the Integrated Automated Travel System (IATS) for computation.

Use the following procedures to create a UTS Export File.

1. **Login** to the UTS Maintenance Module as a System Administrator.
2. **Click** on the **Export Claims to IATS** button. The **UTS Export Claims** screen appears.



3. At the **UTS Export Claims** screen, establish the export **configuration** by completing following fields:
 - **Export All New Claims** - This option is activated by default when this screen appears. If creating an export file for **new claims only**, no action is necessary at this field. When this option is used, UTS will create an export file containing the data for any new claims that were not previously exported.
 - **Re-Export Old Claims From a Particular Date** - **Click** on this field to activate the option if wishing to generate an export file from claims that were **previously transmitted**. When this option is selected, UTS displays the **current date** as the default. If this date is correct, proceed with the process. If the date is not correct, enter the desired date.
 - **Export To Directory** - At this field, enter the **location** where the export file will reside once created. For example; **C:\FROMUTS**.
 - **IATS Reply Directory** - At this field, enter the **location** where the notification of claims accepted by IATS will reside. For example; **C:\FROMUTS\TOUTS**.

Note: If the correct path and directory name is not known, **click** on the **Browse** button to search the various system drives and directories until the desired directory is located.

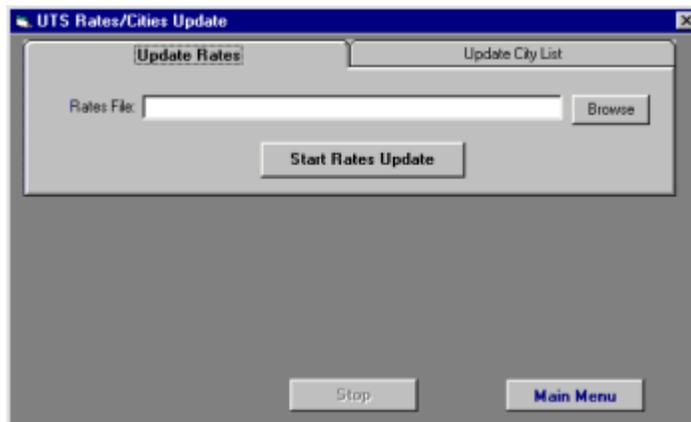
4. After entering the configuration information, **click** the **Start Export** button to begin creating the export file.
5. If the process must be aborted while the file is being created, **click** the **Stop** button.
6. When finished creating the export file, **click** the **Main Menu** button.
7. At the **UTS Maintenance** screen, **click** the **Exit** button to terminate the Maintenance module.

Maintaining Cities and City Rates

Each month, a file is distributed that updates the **per diem rates** that are stored in the UTS database. There is also a table storing the CONUS/OCONUS **city names** that is also updated periodically. These tables can be updated by a user with **System Administrator** privileges.

 **Complete the following steps to update the Cities and City Rates tables:**

1. **Login** to the UTS Maintenance module.
2. At the UTS Maintenance menu, **click** the **Cities and City Rates** button. The **UTS Rates/Cities Update** screen appears.



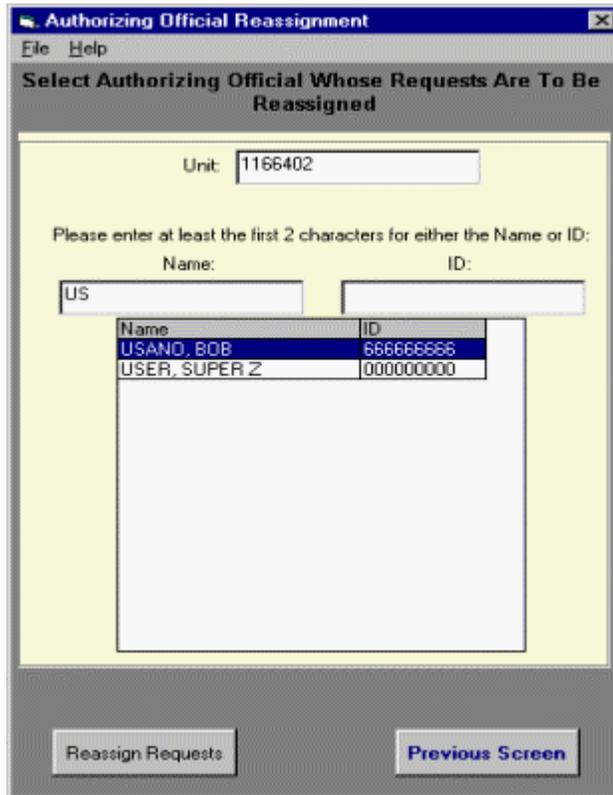
3. At this screen, **click** either the **Update Rates** or the **Update City List** tab, depending on which table is being updated.
4. **Type** the **path** and the **filename** of the update file being processed at the **Rates File** field. If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the desired update file is located.
5. After the correct **path** and the **filename** are entered, **click** the **Start Rates** or **City Update** button.
6. If the process must be aborted while the update is running, **click** the **Stop** button.
7. When finished updating the **Cities** and **City Rates** table, **click** the **Main Menu** button.
8. At the **UTS Maintenance** screen, **click** the **Exit** button to terminate the Maintenance module.

Reassigning Authorizing Official

When user accounts are created in UTS, a default Authorizing Official, (AO), is established for the purpose of approving travel **authorizations, advances** and **settlements**. If a particular AO will be unavailable to approve the requested action, however, a **substitute** AO can be assigned. This is accomplished through the Maintenance Module by reassigning the AO.

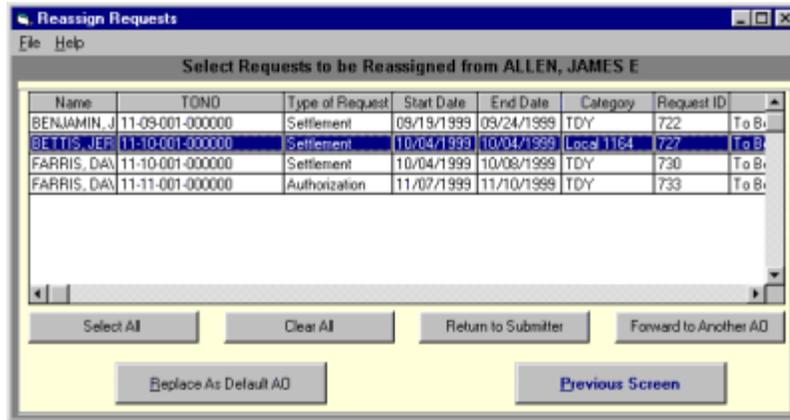
Use the following procedures to reassign an Authorizing Official:

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Authorizing Officer Maintenance** button. The **Authorizing Official Reassignment** screen appears.



Name	ID
USANO, BOB	666666666
USER, SUPER Z	000000000

3. At the **Authorizing Official Reassignment** screen, enter the **unit number**, for the AO who's requests are to be re-assigned, at the **Unit** field.
4. Display a **listing** of individuals eligible for selection as a substitute AO by entering the **first two characters** of either the **Last Name** or the **Employee ID** in the corresponding fields.
5. When the list of names is displayed, **click** on the desired **name** or press the *Up/Down* **arrows** on the keyboard to highlight the correct name and press **Enter**.
6. After selecting the substitute AO, **click** the **Reassign Requests** button. The **Reassign Requests** screen appears.



7. At the Reassign Requests screen, the following **options** are available:
- **Select All** - Click on this button to select all of the travel requests listed at the Reassign Requests screen. Once the items are selected, the user can **click** on the **Return To Submitter** or **Forward To Another AO** option.
 - **Clear All** - Click on this button to **de-select** all of the travel requests presently highlighted.
 - **Return To Submitter** - After selecting a travel request, **click** on this button to return the selected request back to the submitting individual.
 - **Forward To Another AO** - After selecting a travel request, **click** on this button to forward the transaction to a different AO. When this option is selected, UTS displays the **Forward Claims to Selected AO** screen. At this screen the user must select the AO, who will **receive** the transaction.
 - **Replace As Default AO** - Click on this button to replace the AO selected at the **Authorizing Official Reassignment** screen. After clicking this button, UTS displays the **Replacement AO** screen. At this screen the user must select the AO, who will **replace** the **original** default AO.
 - **Previous Screen** - Click on this button to **return** to the **previous screen** -
8. When finished performing the reassignments, **click** the **Previous Screen** button until the **UTS Maintenance** menu reappears.

Maintaining Ships Table

When a claim is processed for a Coast Guard member involving sea duty on board a government ship, a transaction is generated by IATS for the purpose of making **pay adjustments**. The UTS database includes a table that contains the names of ships belonging to the US Coast Guard. The information stored in this table is used to identify the traveler's assigned vessel. This table is **populated** and **updated** by **importing** a file that contains the ship information.

Use the following procedures to import the Ships file:

1. **Login** to the UTS Maintenance Module.
2. At the UTS Maintenance screen, **click** on the **Update Ships List** button. The **Import Ships** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename**, at the **Import Filename** field. For example; **A:\SHIPS.XXX**.
Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Ships data file is located.
4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Ships** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

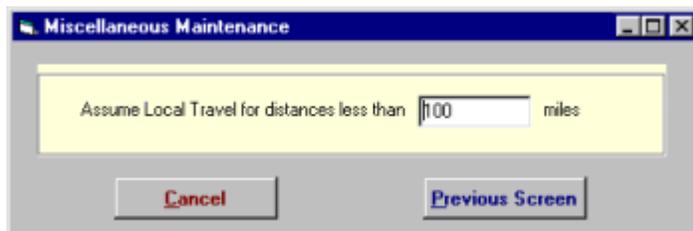
Establishing Miscellaneous Parameters

On occasion, it may be necessary to make an adjustment to a limiting value for a particular input field. This is accomplished by accessing the **UTS Maintenance** module and selecting the **Miscellaneous** feature.

Note: At this time, the only parameter that may be adjusted at this screen is the number of miles that is considered to be **Local Travel** mileage.

 **Use the following procedures to establish a Miscellaneous parameter:**

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Miscellaneous** button. The **Miscellaneous Maintenance** screen appears.



3. At this screen, **enter** the number of miles that should be used as the maximum range for the consideration of **Local Travel** mileage.

4. After entering the Local Travel mileage, **click the Previous Screen button**. If no changes were made, however, **click the Cancel button**.

Maintaining Unit Table

All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned a **Unit Number**.

When a user account is established in UTS, this Unit Number becomes part of the traveler's **personal profile**. UTS uses the Unit Number to associate **Travelers, Proxies, and Authorizing Officials**.

Unit information is stored in the **UTS Maintenance Module** and can be **added, modified, or deleted** by an individual with **System Administrator** privileges.

 **The following links provide detailed instructions for Adding, Modifying, or Deleting Unit Information:**

[Adding Unit Information](#)

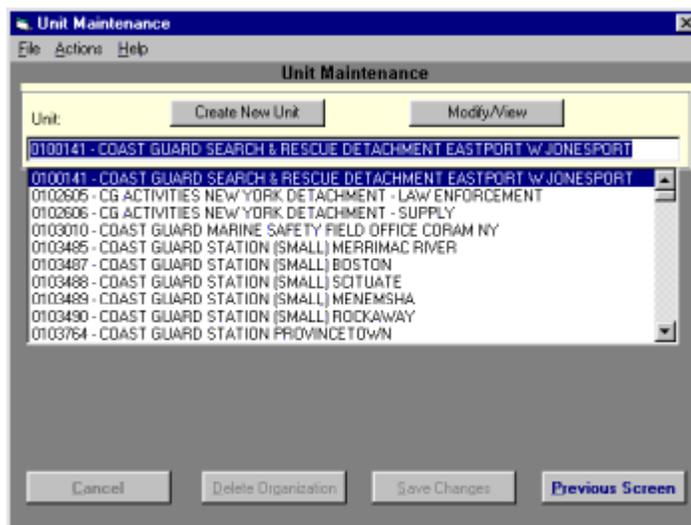
[Modifying Unit Information](#)

[Deleting Unit Information](#)

Add New Unit Information

 **Adding New Unit Information:**

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Add/Modify Units** button. The **Unit Maintenance** screen appears.



3. At this screen, a drop down listing of **Unit Numbers** with a **Description** appears at the **Unit** field.
4. At the **Unit** field, **type** the **unit number** for the new organization being added, then **click** the **Create New Unit** button.
5. After clicking the **Create New Unit** button, the following screen appears:

6. At this screen, enter the required information at the following fields:
 - **Description** - **Click** in this field, and enter a description of the new organization being added.
 - **Default AO Unit** - **Click** in this field and a listing of all of the organizations in the Units Table is displayed. Select a unit by using any of the following methods.
 - (a). **Type** the unit number for the desired organization. When the desired Unit Number/Description is **highlighted**, **click** on this organization.
 - (b). **Click** on the *Up/Down* **arrows** on the right side of the unit listing window until the desired Unit Number/Description is displayed, then **click** on this organization.
 - (c). **Press** the *Up/Down* **arrows** on the keyboard until the desired Unit Number/Description is **highlighted** and then **click** on this organization.

Note: The unit number for the organization being added cannot be used, since the organization doesn't exist yet. After the process to add this unit to the table is completed, modify the Unit Table to select this new organization as the **Default AO Unit**, if desired.

- **Default AO** - Any **individuals** with **AO privileges** for the unit shown at the **Default AO Unit** field will be **listed** at this field. **Point** and **click** on the desired name to make a selection.
- **Funds Type** - At this field a listing of various funding organizations is displayed. **Point** and **click** on the desired organization to make a selection.

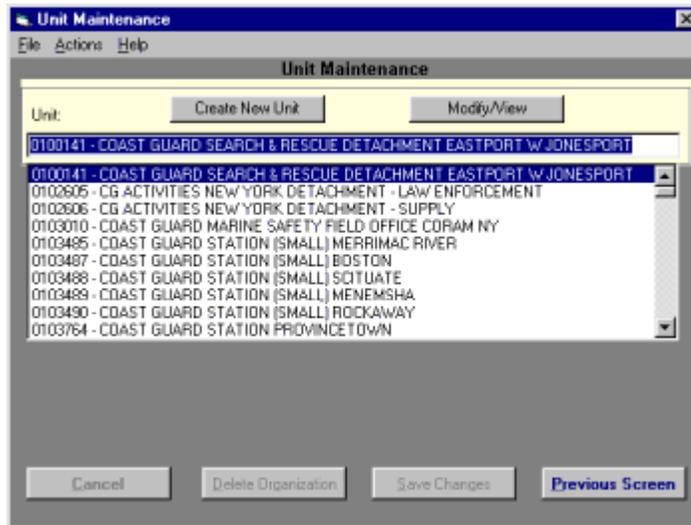
Tip: **Click** on the **Cancel** button if wishing to **abort** the input prior to saving the entries.

7. After entering the required information, **click** the **Save Changes** button.
8. When finished using the Unit Maintenance screen, **click** the **Previous Screen** button and **click** on **Yes** at the **Cancel This Screen** pop-up to return to the **UTS Maintenance** screen.

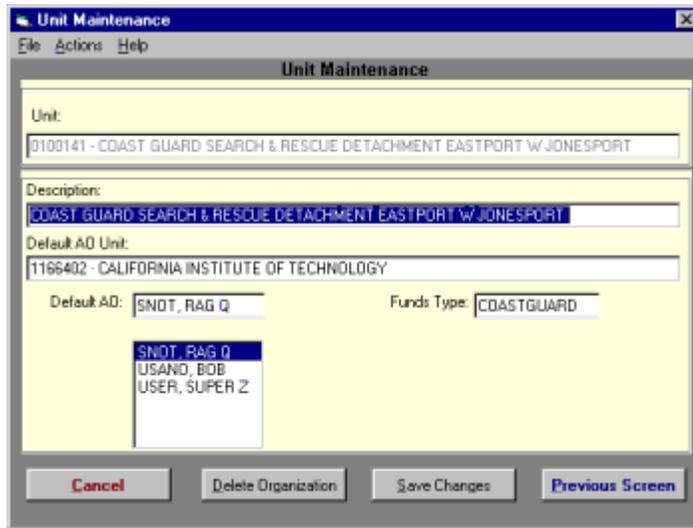
Modify or Delete Unit Information

Modify or Delete Unit Information:

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Add/Modify Units** button. The **Unit Maintenance** screen appears.



3. At this screen, a drop down listing of **Unit Numbers** with a **Description** appears at the **Unit** field. Use any of the following methods to select a unit:
 - **Type** the unit number for the desired organization. When the desired Unit Number/Description is **highlighted**, click on this organization.
 - **Click** on the **Up/Down arrows** on the **right** side of the unit listing window until the desired Unit Number/Description is displayed, then **click** on this organization.
 - **Press** the **Up/Down arrows** on the keyboard until the desired Unit Number/Description is **highlighted** and then **click** on this organization.
4. After selecting a unit, by using either method described above, the following screen appears:



5. At this screen, the user may **remove** the unit from the table by clicking on the **Delete Organization** button, or modify the existing information displayed at the following fields:
 - **Description** - **Click** in this field, and enter a new description or modify the existing information as required.
 - **Default AO Unit** - **Click** in this field, and a listing of all of the organizations in the Units Table is displayed. Select a new unit by using any of the methods described in step (3) above.
 - **Default AO** - Any **individuals** with **AO privileges** for the unit shown at the **Default AO Unit** field will be **listed** at this field. **Point** and **click** on the desired name to make a selection.
 - **Funds Type** - At this field, a listing of various funding organizations is displayed. **Point** and **click** on the desired organization to make a selection.

Tip: Click on the **Cancel** button if wishing to **abort** the changes prior to saving the entries.
6. After modifying any existing information, **click** the **Save Changes** button.
7. When finished using the Unit Maintenance screen, **click** the **Previous Screen** button and **click** on **Yes** at the **Cancel This Screen** pop-up to return to the **UTS Maintenance** screen.

Importing Unit Data File

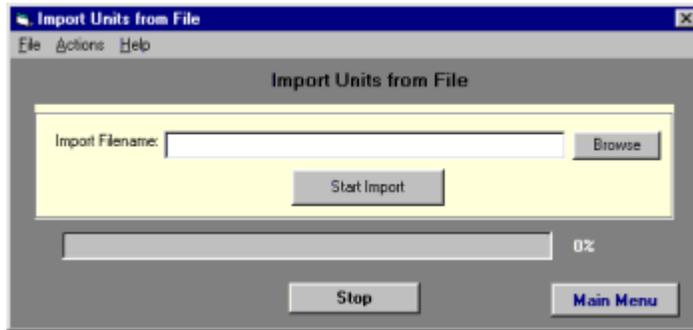
All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned an **Unit Number**.

When a user account is established in UTS, this Unit Number becomes part of the traveler's **personal profile** and is used by UTS to associate **Travelers**, **Proxies**, and **Authorizing Officials**.

Unit information is stored in the **Unit Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically, by PMIS-JUMPS.

 **Use the following procedures to import the Unit Data File:**

1. **Login** to the UTS Maintenance Module.
2. **Click** on the **Import - Update** button. The **Import Units from File** screen appears.



3. At this screen, enter the **path** where the import file can be located and the **filename** at the **Import Filename** field. For example; **A:\UNITS.XXX**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Unit Data file is located.

4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Units from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

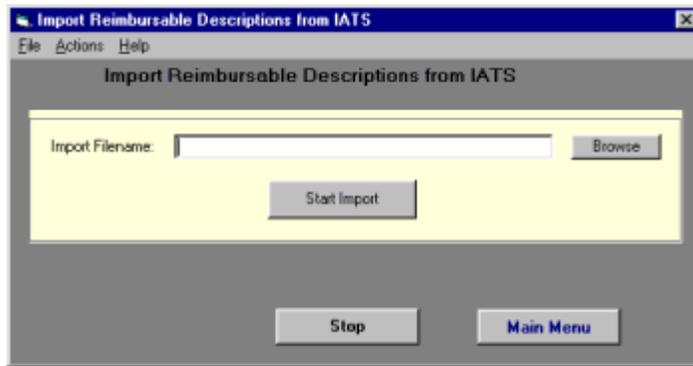
Importing Reimbursable Expense Descriptions

While processing a travel **authorization** or **settlement** using UTS, a pop-up table appears at the **Reimbursable Expenses** section when the cursor is positioned at the **Description** field.

The **Reimbursable Expense Descriptions** are stored in the **Reimbursable Expense Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated by **IATS**.

 **Use the following procedures to import the Reimbursable Expenses Data File:**

1. **Login** to the UTS Maintenance Module.
2. **Click** on the **Import Reimbursable Desc.** button. The **Import Reimbursable Descriptions from IATS** screen appears.



3. At this screen, enter the **path** where the import file can be located and the **filename** at the **Import Filename** field. For example; A:\EXPENSE.XXX.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Reimbursable Expense Data file is located.

4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Reimbursable Descriptions from IATS** screen, **click** the **Main Menu** button to return to the UTS Maintenance screen.

Importing Personnel Data File

User accounts in the UTS database are automatically added and updated by importing a file containing personnel information.

 **Use the following procedures to import the Personnel file:**

1. **Login** to the UTS Maintenance Module.
2. At the UTS Maintenance screen, **click** on the **Import/Update Personnel** button. The **Import Personnel** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; A:\PERSONS.XXX.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the personnel file is located.

- Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
- When finished using the **Import Personnel** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing Accounting Data

Accounting Appropriations in the UTS database are automatically added and updated by importing a file containing accounting lines.

 Use the following procedures to import the Accounting file:

- Login** to the UTS Maintenance Module.
- At the **UTS Maintenance** screen, **click** on the **Import/Update Accounting** button. The **Import Accounting** screen appears.



- At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\RT200038.DAT**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

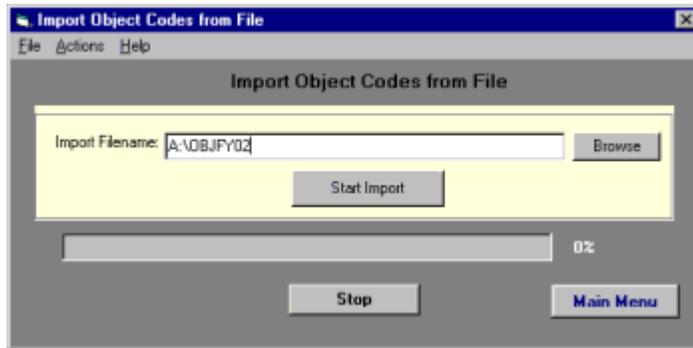
- Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
- When finished using the **Import Accounting** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing Object Codes

Object Codes in the UTS database are automatically added and updated by importing a file containing Object Codes by Fiscal Year.

Use the following procedures to import Object Codes:

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Import/Update Object Codes** button. The **Import Object Codes from File** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\OBJFY02**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

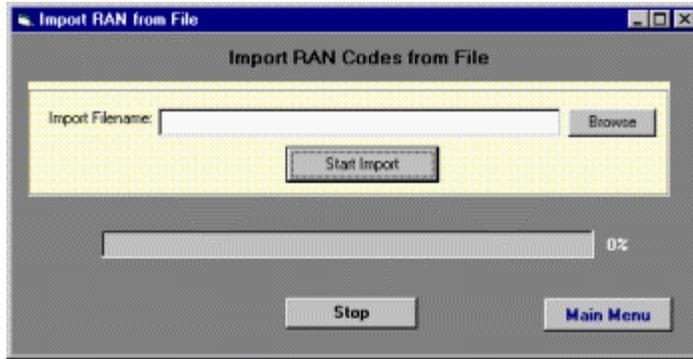
4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Object Codes from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing RAN Codes

RAN Codes in the UTS database are automatically added and updated by importing a file containing RAN Codes.

Use the following procedures to import the RAN Codes file:

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Import/Update RAN Codes** button. The **Import RAN Codes from File** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\RAN00038.DAT**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import RAN Codes from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Personal Profiles

About Profile

A Personal Profile is a user account that is created for every individual who will use UTS and every traveler, who's claim is processed through UTS. This profile is used to store personal information for the user and establishes their privileges. Profiles can only be created or deleted by a user with **System Administrator** privileges.

The capabilities for a user to create, view, modify, or delete a personal profile varies according to their **View** or **Privilege** as follows:

- **Traveler** - May view, modify, or delete his/her own profile.
- **System Administrator** - May create, view, modify, or delete any personal profile.

Note: **Privileges** can only be modified by users with a **System Administrator** View.

Creating Profiles

Personal Profiles for UTS users or travelers are ordinarily created automatically by importing a personnel file. Profiles may also be created manually through the UTS **Maintenance** module by an individual possessing the **System Administrator** privilege.

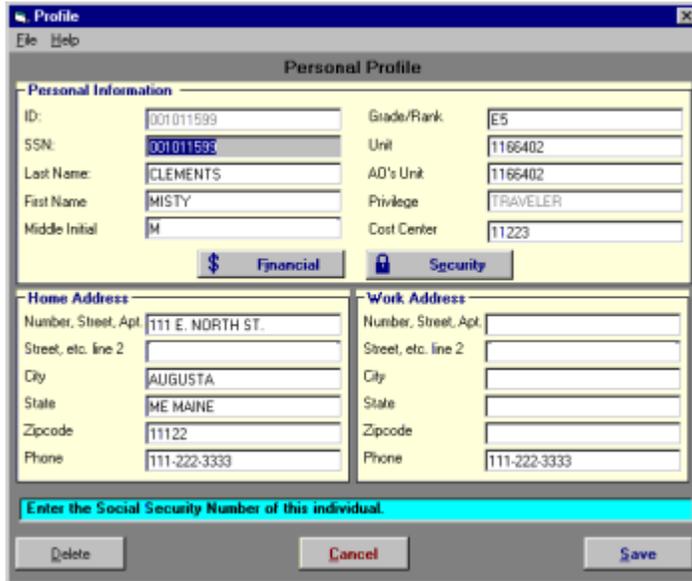
Manually creating a user Profile:

1. **Login** to the UTS Maintenance module.

2. Click on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears:



3. Click on the **Create New** button and the following **Profile** screen appears.

A screenshot of a software window titled "Profile". The window has a menu bar with "File" and "Help". The main content area is titled "Personal Profile" and is divided into several sections. The "Personal Information" section contains fields for ID (001011599), SSN (001011599), Last Name (CLEMENTS), First Name (MISTY), Middle Initial (M), Grade/Rank (E5), Unit (1166402), AD's Unit (1166402), Privilege (TRAVELER), and Cost Center (11223). Below this section are two buttons: "Financial" (with a dollar sign icon) and "Security" (with a lock icon). The "Home Address" section contains fields for Number, Street, Apt. (111 E. NORTH ST.), Street, etc. line 2, City (AUGUSTA), State (ME MAINE), Zipcode (11122), and Phone (111-222-3333). The "Work Address" section contains fields for Number, Street, Apt., Street, etc. line 2, City, State, Zipcode, and Phone (111-222-3333). At the bottom of the window, there is a blue bar with the text "Enter the Social Security Number of this individual." and three buttons: "Delete", "Cancel", and "Save".

4. Complete each section with the information needed to identify the user.
5. **Point** to the field you wish to access, **click** the left mouse button.
6. **Type** the required information.
7. When finished, press **Enter** or **Tab** to advance to the next field or **point** to the desired field and **click** the left mouse button.

Note: The **Work Address** section is optional and every field except **Phone** can be left **blank**.

Tip: Don't forget to **click** on the **Security** and **Financial** buttons and complete those screens also.

8. When finished completing the Personal Profile, Financial Information, and Security Information screens, **click** the **Save** button.

See Also

[Personal Information](#)

[Financial Information Screen](#)

[Security Information](#)

[Privileges](#)

[New Logon Password](#)

[New Secondary Password](#)

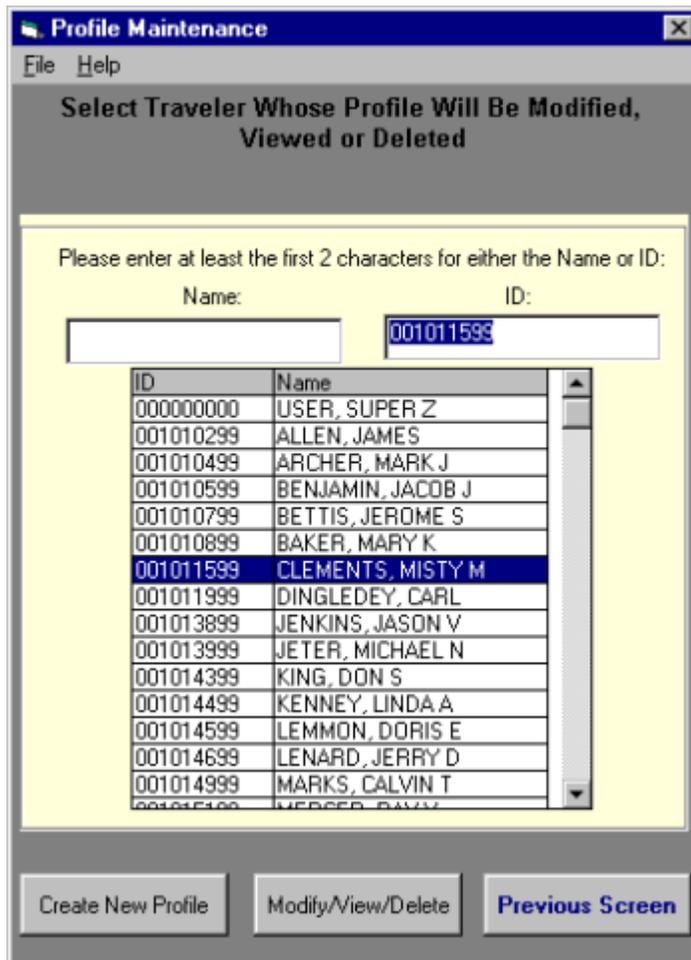
- Additional Information
- Authentication Information
- Modifying Profiles
- Deleting Profiles

Modifying Profiles

To modify a Personal Profile, the UTS user must login to UTS in either the **Traveler** or **System Administrator** View mode.

Modifying a Profile using the System Administrator View:

1. **Login** to the UTS **Maintenance** module.
2. **Click** on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears.



ID	Name
000000000	USER, SUPER Z
001010299	ALLEN, JAMES
001010499	ARCHER, MARK J
001010599	BENJAMIN, JACOB J
001010799	BETTIS, JEROME S
001010899	BAKER, MARY K
001011599	CLEMENTS, MISTY M
001011999	DINGLEDEY, CARL
001013899	JENKINS, JASON V
001013999	JETER, MICHAEL N
001014399	KING, DON S
001014499	KENNEY, LINDA A
001014599	LEMMON, DORIS E
001014699	LENARD, JERRY D
001014999	MARKS, CALVIN T

3. At this screen, enter either the first (2) letters of the **last name** or the first (2) digits of the **Employee ID** for the profile being modified. Any profiles matching the criteria appear in the table.

- Click on the desired **profile**, then click the **Modify/View/Delete** button. The **Personal Profile** screen appears.

- At the **Personal Profile** screen, press **Enter** or **Tab** to advance through the input fields, or **point** to the desired field and click the **left** mouse button.
- Type** the required change.
- Click on the **Save** button when finished.

Modifying a Profile using the Traveler View:

- Login** to the **UTS Processing** module in the **Traveler View**. If logged in as a **Proxy** or **Authorizing Official**, click on the **Log in as** menu at the top of the **UTS Request Status** screen and change the View to **Traveler**.
- At the **UTS Request Status** screen, click on the **Profile** menu.



- At the **Profile** drop down menu, click on the **Modify or View Profile** option.
- At the **Personal Profile** screen, press *Enter* or *Tab* to advance through the input fields, or **point** to the desired field and click the **left** mouse button.
- Type** the required change.
- Click on the **Save** button when finished.

Tip: It may be necessary to click on the **Security** and **Financial** buttons and make changes at those screens also.

See Also

[Personal Information](#)

[Financial Information Screen](#)

[Security Information](#)

[Privileges](#)

[New Logon Password](#)

[New Secondary Password](#)

[Additional Information](#)

[Authentication Information](#)

Deleting Profiles

Personal Profiles may only be deleted by users with **System Administrator** privileges.

Deleting a Profile:

1. **Login** to the **UTS Maintenance** module.
2. **Click** on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears.

Profile Maintenance

File Help

Select Traveler Whose Profile Will Be Modified, Viewed or Deleted

Please enter at least the first 2 characters for either the Name or ID:

Name: ID:

ID	Name
000000000	USER, SUPER Z
001010299	ALLEN, JAMES
001010499	ARCHER, MARK J
001010599	BENJAMIN, JACOB J
001010799	BETTIS, JEROME S
001010899	BAKER, MARY K
001011599	CLEMENTS, MISTY M
001011999	DINGLEDEY, CARL
001013899	JENKINS, JASON V
001013999	JETER, MICHAEL N
001014399	KING, DON S
001014499	KENNEY, LINDA A
001014599	LEMMON, DORIS E
001014699	LENARD, JERRY D
001014999	MARKS, CALVIN T
001015199	MERCEP, RAY M

Create New Profile Modify/View/Delete Previous Screen

- At this screen, enter either the first (2) letters of the **last name** or the first (2) digits of the **User ID** for the profile being modified. Any profiles matching the criteria appear in the table.
- Click on the desired **profile**, then click the **Modify/View/Delete** button. The **Personal Profile** screen appears.

Profile

File Help

Personal Profile

Personal Information

ID: Grade/Rank:

SSN: Unit:

Last Name: Privilege:

First Name:

Middle Initial:

Home Address

Number, Street, Apt:

Street, etc. line 2:

City:

State:

Zipcode:

Phone:

Work Address

Number, Street, Apt:

Street, etc. line 2:

City:

State:

Zipcode:

Phone:

Enter the Social Security Number of this individual.

Delete Cancel Save

-
5. At the **Personal Profile** screen, click the **Delete** button.

Personal Information

Enter the information needed to identify the Traveler:

1. **ID:** Enter the traveler's **Employee ID number** to be used for logging into UTS. This number must be (9) numeric characters.
2. **SSN:** Enter the traveler's **Social Security Number**. When entering this number, do not use **spaces** or **dashes**. This field must also be (9) numeric characters.
3. **Last Name:** Enter the traveler's last name.
4. **First Name:** Enter the traveler's first name.
5. **Middle Initial:** Enter the traveler's middle initial. (**Optional**).
6. **Grade/Rank:** At this field, a table appears listing the pay grades **CIV, E1-E9, O1-O10, W1-W5, O1E-O3E, GS1-GS16, GM1-GM16, WG1-WG16** and **WS1-WS16**. Either **type** the traveler's pay grade or **click** the *Up/Down arrow* buttons until the desired pay grade is displayed. Place the pointer on the desired pay grade and **click** the left mouse button to make a selection.
7. **Unit:** Enter the (7) digit **number** representing the unit or agency the traveler is assigned to.
8. **AO's Unit:** Enter the (7) digit **number** representing the unit or agency the traveler's **Authorizing Official** is assigned to.
9. **Privilege:** When creating a traveler profile, the default privilege is **Traveler**. To change the **privilege**, **click** on the **Security Information** button.
10. **Cost Center:** Enter the (5) digit **number** representing the **Cost Center** associated to the traveler's assigned Unit.

Note: The **Privileges** section can only be accessed by the **System Administrator**.

Home Address

A Home Address must be entered into the **Home Address** section of the **Personal Profile** screen for every profile created.

-- Home Address	
Number, Street, Apt.	111 S. EAST ST.
Street, etc. line 2	
City	INDIANAPOLIS
State	IN INDIANA
Zipcode	46223
Phone	317-333-4444

 **Enter the required information at each field to complete the Home Address section.**

1. **Point** to the field you wish to access, **click** the left mouse button and the color changes to **gray**.
2. **Type** the required information.
3. When finished, press **Enter** or **Tab** to advance to the next field or **point** to the desired field and **click** the left mouse button.

Tip: At the **State** field, a drop down listing appears. **Click** the *up/down* arrows on the right side of the listing until the desired state or country name appears. **Click** on the **name** to populate the **State** field.

Note: **Address line 2** and the **Phone** fields are **optional**. These fields may be left blank.

Work Address

With the exception of a **Work Phone Number**, the Work Address is **optional**, when creating a user profile. It is always a good idea, however, to obtain as much information as possible in case it is necessary to route documentation through the traveler's office.

- Work Address	
Number, Street, Apt.	<input type="text"/>
Street, etc. line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zipcode	<input type="text"/>
Phone	317-555-1212

 **Enter the required information at each field to complete the Work Address section.**

1. **Point** to the field you wish to access, **click** the left mouse button and the color changes to **gray**.
2. **Type** the required information.
3. When finished, press *Enter* or *Tab* to advance to the next field or **point** to the desired field and **click** the left mouse button.

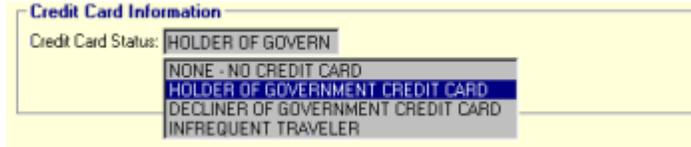
Tip: At the **State** field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired state or country name appears. **Click** on the **name** to populate the **State** field.

Note: The **Phone** field cannot be left blank. A work phone number is **mandatory** when creating a user profile.

Financial Information

Credit Card Information

The **Credit Card Information** section of the Financial Information screen is used to **identify** whether the traveler is participating in the **Government Charge Card Program**.



The screenshot shows a dropdown menu titled "Credit Card Information". The current selection is "HOLDER OF GOVERN". The dropdown list is open, showing the following options: "NONE - NO CREDIT CARD", "HOLDER OF GOVERNMENT CREDIT CARD" (which is highlighted in blue), "DECLINER OF GOVERNMENT CREDIT CARD", and "INFREQUENT TRAVELER".

 **Enter the following Information to complete the Credit Card Information section:**

1. Make the appropriate **selection** to identify the traveler's credit card status:
 - **Credit Card Status** - At this field, a drop down listing appears displaying several options. **Point** and **click** on the desired **option** to make a selection.
2. When finished making a selection, **click** the **Previous Screen** button.
3. At the **Personal Profile** screen, **click** the **Save** button to save the credit card information.

Security Information

Click the **Security Information** button on the **Personal Profile** screen and the Security Information screen appears: This screen is used to capture the information needed to grant access to the UTS program.

The screenshot shows a window titled "Profile - Security Options" for user "FARRIS, DAVID O". The "Security Information" section contains several input fields and checkboxes. The "Privileges" section has "Authorizing Official" and "Systems Administrator" checkboxes. The "New Logon Password" and "New Secondary Password" sections each have "Enter" and "Re-enter" fields. The "Authentication Information" section has "Mother's Maiden Name", "Date of Birth", and "Town of Birth" fields. The "Additional Information" section has "Default Authorizing Officer" (ALLEN, JAMES E), "Signature Proxy" (BETTIS, JEROME), "Office Email Address", and "Home Email Address" fields. A red error message at the bottom states "Please enter your mothers maiden name." and there are "Cancel" and "Previous Screen" buttons.

At this screen, the **Traveler** or **System Administrator** must enter the appropriate information to complete each section.

 The following links provide detailed information for completing these sections:

- [Privileges](#)
- [New Logon Password](#)
- [New Secondary Password](#)
- [Authentication Information](#)
- [Additional Information](#)

Privileges

Privileges are associated with the **View** Modes. The privilege or view identifies what **capabilities** and **access** the user possesses. When a user profile is created, the default privilege is **Traveler**. A user can be granted **more** than one privilege, however.

The close-up shows the "Privileges" section with "Authorizing Official" checked and "Systems Administrator" unchecked.

Note: The Privileges for **Authorizing Official**, or **System Administrator**: can only be added or changed by a **System Administrator**.

Changing or Adding Privileges:

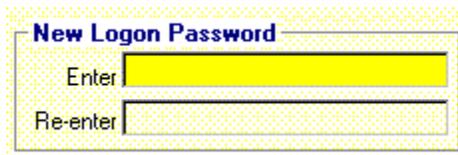
1. **Login** to the UTS **Maintenance** Module.
2. At the **UTS Maintenance Menu**, click on the **Profiles: Add/Update/Delete** button.
3. The next screen to appears requires the System Administrator to **select** a traveler. At this screen, **enter** either the first (2) letters of the **last name** or the first (2) digits of the **Employee ID** for the profile being modified. Any profiles matching the criteria appear in the table.
4. **Click** on the desired **profile**, then **click** the **Modify/View/Delete** button. The **Personal Profile** screen appears.
5. At the Personal Profile screen, **click** the **Security Information** button.
6. At the **Security Information** screen, press *Enter*, *Tab*, or use the *left* and *right arrow* keys to highlight the desired privilege.
7. **Point** to the desired or highlighted option and **click** the left mouse button. A **check mark** appears next to the selected privilege.

Tip: Clicking on a privilege that has a **check mark** causes the check mark to **disappear** and **deselects** the privilege.

New Logon Password

The New Logon Password section is used to establish a unique Logon Password for every user who will access UTS.

Tip: The Logon Password must be (8) characters. In addition, (2) of the characters must be **numeric**.



The image shows a screenshot of a software interface titled "New Logon Password". It contains two input fields. The first field is labeled "Enter" and is highlighted in yellow. The second field is labeled "Re-enter".

At the **Enter** field, **type** the **Password** the user will enter when logging into UTS. After typing the password and pressing *Enter*, the user is required to type the password a second time at the **Re-enter** field.

Note: Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

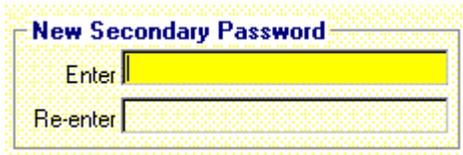
See Also

[Changing Passwords](#)

New Secondary Password

The Secondary Password serves as the **electronic signature** for releasing travel authorizations and settlements for further processing. A Secondary Password must be created before a user is able to login to UTS.

Tip: The Secondary Password must be (8) characters. In addition, (2) of the characters must be **numeric**.



The screenshot shows a form titled "New Secondary Password" with a yellow background. It contains two input fields: "Enter" and "Re-enter". The "Enter" field is highlighted in yellow.

At the **Enter** field, type the **Secondary Password** the user will type when releasing travel authorizations and settlements. After typing the password and pressing *Enter*, the user is required to type the password a second time at the **Re-enter** field.

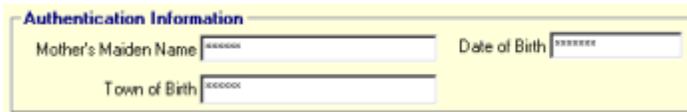
Note: Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

See Also

[Changing Passwords](#)

Authentication Information

The Authentication Information section of the Security Information screen is used to verify a users access to the UTS program. When logging into UTS, the user is required to enter a **password** at the UTS Password screen. If the user cannot remember their password, **access** can be gained by **clicking** on the **Forgot my Password** button and entering the **authentication information**. If this information matches the authentication information previously entered into the UTS database, access is granted.



The screenshot shows a form titled "Authentication Information" with a yellow background. It contains three input fields: "Mother's Maiden Name", "Date of Birth", and "Town of Birth".

At this screen enter the following information:

- Mother's Maiden Name
- Date of Birth
- Town of Birth

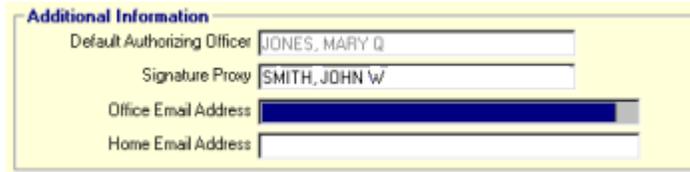
See Also

[Logging into UTS](#)

[Forgot my Password](#)

Additional Information

The additional Information section is used to establish who is designated as an **Authorizing Official** to approve travel actions. This section is also used to establish who can act as a **Signature Proxy** on behalf of the Traveler.



The screenshot shows a form titled "Additional Information" with four input fields. The "Default Authorizing Officer" field contains "JONES, MARY Q". The "Signature Proxy" field contains "SMITH, JOHN W". The "Office Email Address" field is empty. The "Home Email Address" field is empty.

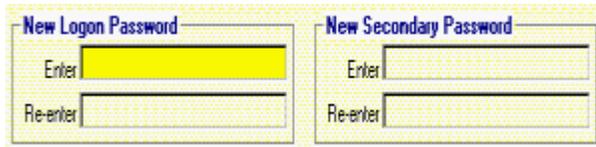
- **Default Authorizing Officer:** At this field, a listing of **Names** appears for individuals possessing **AO** privileges for the Traveler's unit. **Point** to the desired name and **click** the left mouse button to make a selection.
- **Signature Proxy:** Any individual belonging to the same unit as the Traveler, may be designated as a Signature Proxy on behalf of the Traveler. At this field, the user must enter the first (2) letters of the desired Signature Proxy's **last name**. A listing of **Names**, beginning with the two letters entered, appears. If the desired name is highlighted, press **Enter**. If the desired name is not highlighted, **click** the *Up/Down* arrows on the keyboard to scroll through the list until the correct name appears.
- **Office Email Address:** Enter an email address at this field in order to **send/receive** UTS generated **notifications** that a **Request for Authorization, Advance, or Settlement** has been **forwarded** to the **AO, Traveler, or Proxy**.
- **Home Email address:** For future use.

Changing Passwords

Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

Complete the following steps to change a Logon or Secondary Password:

1. Login to UTS. If the **View** mode displayed on the **UTS Request Status** or **UTS Requests Requiring Action** screen is other than **Traveler**, change the view to **Traveler** to continue.
2. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, **click** on the **Profile** menu.
3. At the Profile drop down menu, **click** on **Modify or View Profile**.
4. At the **Personal Profile** screen, **click** on the **Security Information** button.
5. At the **Security Information** screen, press **Enter** or **Tab** to advance through the input fields or **point** and **click** on the **Enter** field at the **New Logon Password** or **New Secondary Password** sections.



The image shows two side-by-side form boxes. The left box is titled 'New Logon Password' and contains two input fields: 'Enter' and 'Re-enter'. The 'Enter' field is highlighted in yellow. The right box is titled 'New Secondary Password' and also contains two input fields: 'Enter' and 'Re-enter'.

6. **Type** a new Logon or Secondary Password and press *Enter*.
7. At the **Re-enter** field, **type** the new Logon or Secondary Password and press *Enter*.
8. **Click** on the **Previous Screen** button when finished.
9. At the **Profile** screen, **click** the **Save** button.

See Also

[Changing View](#)

UTS Maintenance

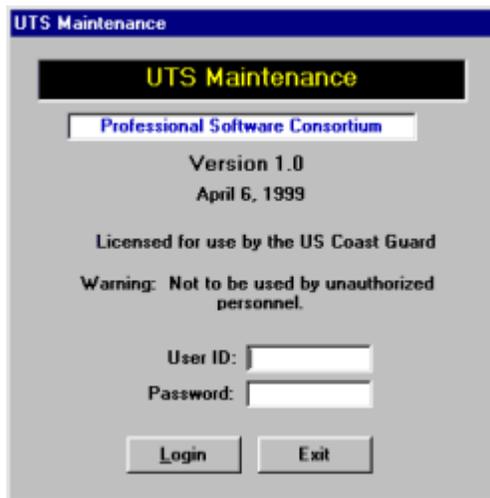
About UTS Maintenance

The UTS Maintenance module is used to perform a variety of functions that are restricted to users with **System Administrator** privileges. After logging into the UTS Maintenance module, the user has the ability to perform the following actions:

- **Export travel claims from UTS to IATS for computation**
- **Create, modify, and delete user profiles**
- **Maintain per diem rates and city names**
- **Reassign travel requests from one Authorizing Official to another**
- **Import data files containing ship information**
- **Establish Miscellaneous Parameters**
- **Modify or delete unit information**
- **Import data files containing unit information**
- **Import data files containing reimbursable expense information**
- **Import data files containing personnel information**
- **Import data files containing accounting appropriations**

Maintenance Login

Access to the UTS Maintenance module is limited to users with **System Administrator** privileges.



UTS Maintenance

UTS Maintenance

Professional Software Consortium

Version 1.0
April 6, 1999

Licensed for use by the US Coast Guard

Warning: Not to be used by unauthorized personnel.

User ID:

Password:

Login Exit

- **User ID** - At this field, the System Administrator must **type** his/her assigned **Employee ID** number and press *Enter*.
- **Password** - At this field, the System Administrator must **type** his/her assigned **Password** and press *Enter* or **click** on the **Login** button.

See Also

[About UTS Maintenance](#)

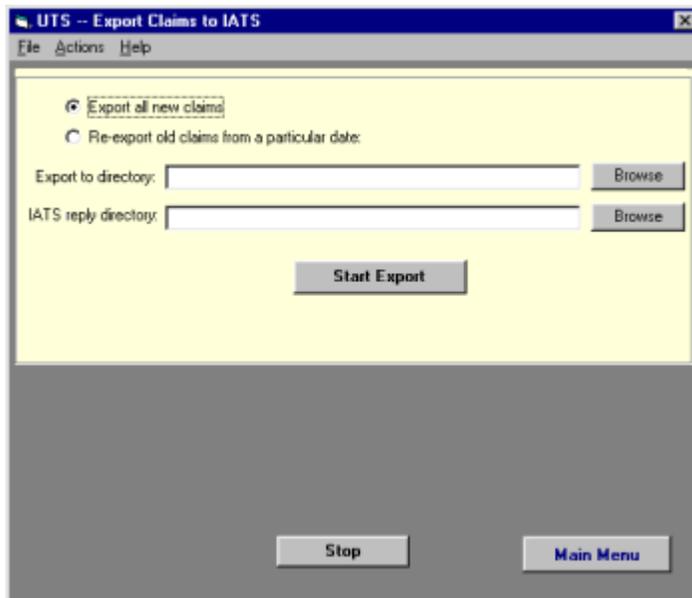
-
- About System Administrators
 - New Logon Password
 - Changing Passwords

Exporting Claims

After a Request for **Advance** or **Settlement** has been **approved** by the Authorizing Official, an **export** file must be created. The export file can then be **imported** into the Integrated Automated Travel System (IATS) for computation.

Use the following procedures to create a UTS Export File.

1. **Login** to the UTS Maintenance Module as a System Administrator.
2. **Click** on the **Export Claims to IATS** button. The **UTS Export Claims** screen appears.



3. At the **UTS Export Claims** screen, establish the export **configuration** by completing following fields:
 - **Export All New Claims** - This option is activated by default when this screen appears. If creating an export file for **new claims only**, no action is necessary at this field. When this option is used, UTS will create an export file containing the data for any new claims that were not previously exported.
 - **Re-Export Old Claims From a Particular Date** - **Click** on this field to activate the option if wishing to generate an export file from claims that were **previously transmitted**. When this option is selected, UTS displays the **current date** as the default. If this date is correct, proceed with the process. If the date is not correct, enter the desired date.
 - **Export To Directory** - At this field, enter the **location** where the export file will reside once created. For example; **C:\FROMUTS**.
 - **IATS Reply Directory** - At this field, enter the **location** where the notification of claims accepted by IATS will reside. For example; **C:\FROMUTS\TOUTS**.

Note: If the correct path and directory name is not known, **click** on the **Browse** button to search the various system drives and directories until the desired directory is located.

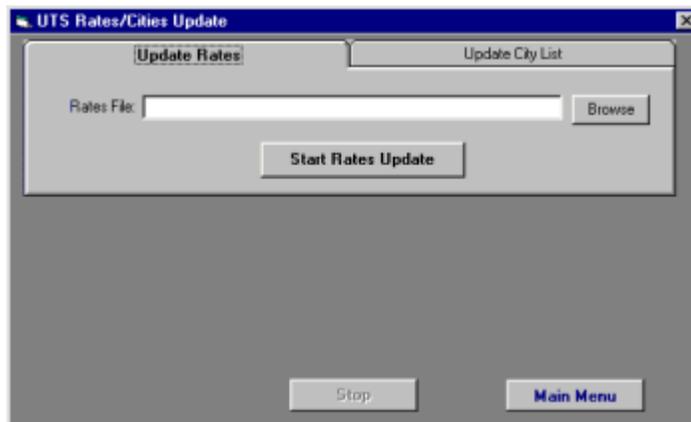
4. After entering the configuration information, **click** the **Start Export** button to begin creating the export file.
5. If the process must be aborted while the file is being created, **click** the **Stop** button.
6. When finished creating the export file, **click** the **Main Menu** button.
7. At the **UTS Maintenance** screen, **click** the **Exit** button to terminate the Maintenance module.

Maintaining Cities and City Rates

Each month, a file is distributed that updates the **per diem rates** that are stored in the UTS database. There is also a table storing the CONUS/OCONUS **city names** that is also updated periodically. These tables can be updated by a user with **System Administrator** privileges.

 **Complete the following steps to update the Cities and City Rates tables:**

1. **Login** to the UTS Maintenance module.
2. At the UTS Maintenance menu, **click** the **Cities and City Rates** button. The **UTS Rates/Cities Update** screen appears.



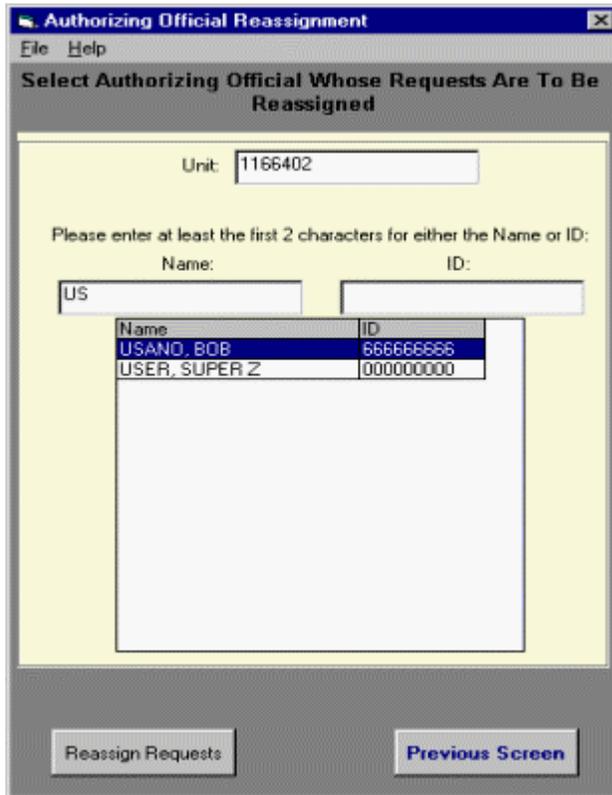
3. At this screen, **click** either the **Update Rates** or the **Update City List** tab, depending on which table is being updated.
4. **Type** the **path** and the **filename** of the update file being processed at the **Rates File** field. If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the desired update file is located.
5. After the correct **path** and the **filename** are entered, **click** the **Start Rates** or **City Update** button.
6. If the process must be aborted while the update is running, **click** the **Stop** button.
7. When finished updating the **Cities** and **City Rates** table, **click** the **Main Menu** button.
8. At the **UTS Maintenance** screen, **click** the **Exit** button to terminate the Maintenance module.

Reassigning Authorizing Official

When user accounts are created in UTS, a default Authorizing Official, (AO), is established for the purpose of approving travel **authorizations, advances and settlements**. If a particular AO will be unavailable to approve the requested action, however, a **substitute** AO can be assigned. This is accomplished through the Maintenance Module by reassigning the AO.

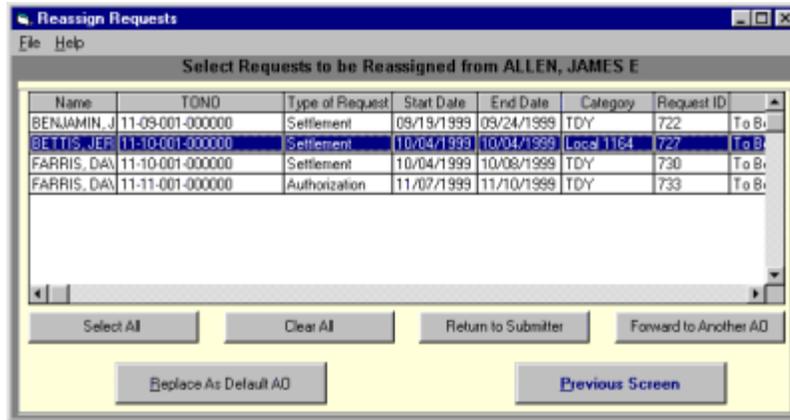
Use the following procedures to reassign an Authorizing Official:

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Authorizing Officer Maintenance** button. The **Authorizing Official Reassignment** screen appears.



Name	ID
USANO, BOB	666666666
USER, SUPER Z	000000000

3. At the **Authorizing Official Reassignment** screen, enter the **unit number**, for the AO who's requests are to be re-assigned, at the **Unit** field.
4. Display a **listing** of individuals eligible for selection as a substitute AO by entering the **first two characters** of either the **Last Name** or the **Employee ID** in the corresponding fields.
5. When the list of names is displayed, **click** on the desired **name** or press the *Up/Down* **arrows** on the keyboard to highlight the correct name and press **Enter**.
6. After selecting the substitute AO, **click** the **Reassign Requests** button. The **Reassign Requests** screen appears.



7. At the Reassign Requests screen, the following **options** are available:
- **Select All** - Click on this button to select all of the travel requests listed at the Reassign Requests screen. Once the items are selected, the user can **click** on the **Return To Submitter** or **Forward To Another AO** option.
 - **Clear All** - Click on this button to **de-select** all of the travel requests presently highlighted.
 - **Return To Submitter** - After selecting a travel request, **click** on this button to return the selected request back to the submitting individual.
 - **Forward To Another AO** - After selecting a travel request, **click** on this button to forward the transaction to a different AO. When this option is selected, UTS displays the **Forward Claims to Selected AO** screen. At this screen the user must select the AO, who will **receive** the transaction.
 - **Replace As Default AO** - Click on this button to replace the AO selected at the **Authorizing Official Reassignment** screen. After clicking this button, UTS displays the **Replacement AO** screen. At this screen the user must select the AO, who will **replace** the **original** default AO.
 - **Previous Screen** - Click on this button to **return** to the **previous screen** -
8. When finished performing the reassignments, **click** the **Previous Screen** button until the **UTS Maintenance** menu reappears.

Maintaining Ships Table

When a claim is processed for a Coast Guard member involving sea duty on board a government ship, a transaction is generated by IATS for the purpose of making **pay adjustments**. The UTS database includes a table that contains the names of ships belonging to the US Coast Guard. The information stored in this table is used to identify the traveler's assigned vessel. This table is **populated** and **updated** by **importing** a file that contains the ship information.

Use the following procedures to import the Ships file:

1. **Login** to the UTS Maintenance Module.
2. At the UTS Maintenance screen, **click** on the **Update Ships List** button. The **Import Ships** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename**, at the **Import Filename** field. For example; **A:\SHIPS.XXX**.
Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Ships data file is located.
4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Ships** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

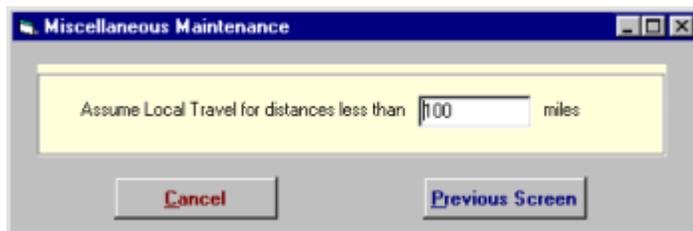
Establishing Miscellaneous Parameters

On occasion, it may be necessary to make an adjustment to a limiting value for a particular input field. This is accomplished by accessing the **UTS Maintenance** module and selecting the **Miscellaneous** feature.

Note: At this time, the only parameter that may be adjusted at this screen is the number of miles that is considered to be **Local Travel** mileage.

 **Use the following procedures to establish a Miscellaneous parameter:**

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Miscellaneous** button. The **Miscellaneous Maintenance** screen appears.



3. At this screen, **enter** the number of miles that should be used as the maximum range for the consideration of **Local Travel** mileage.

4. After entering the Local Travel mileage, **click the Previous Screen button**. If no changes were made, however, **click the Cancel button**.

Maintaining Unit Table

All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned a **Unit Number**.

When a user account is established in UTS, this Unit Number becomes part of the traveler's **personal profile**. UTS uses the Unit Number to associate **Travelers, Proxies, and Authorizing Officials**.

Unit information is stored in the **UTS Maintenance Module** and can be **added, modified, or deleted** by an individual with **System Administrator** privileges.

 **The following links provide detailed instructions for Adding, Modifying, or Deleting Unit Information:**

[Adding Unit Information](#)

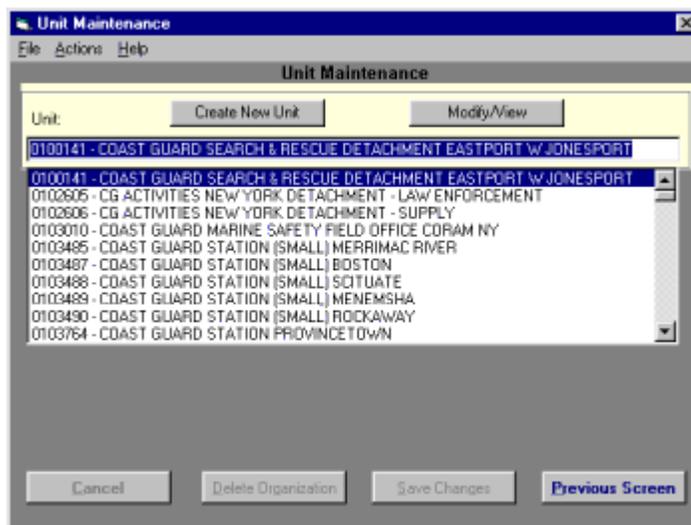
[Modifying Unit Information](#)

[Deleting Unit Information](#)

Add New Unit Information

 **Adding New Unit Information:**

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Add/Modify Units** button. The **Unit Maintenance** screen appears.



3. At this screen, a drop down listing of **Unit Numbers** with a **Description** appears at the **Unit** field.
4. At the **Unit** field, **type** the **unit number** for the new organization being added, then **click** the **Create New Unit** button.
5. After clicking the **Create New Unit** button, the following screen appears:

6. At this screen, enter the required information at the following fields:
 - **Description** - **Click** in this field, and enter a description of the new organization being added.
 - **Default AO Unit** - **Click** in this field and a listing of all of the organizations in the Units Table is displayed. Select a unit by using any of the following methods.
 - (a). **Type** the unit number for the desired organization. When the desired Unit Number/Description is **highlighted**, **click** on this organization.
 - (b). **Click** on the *Up/Down* **arrows** on the right side of the unit listing window until the desired Unit Number/Description is displayed, then **click** on this organization.
 - (c). **Press** the *Up/Down* **arrows** on the keyboard until the desired Unit Number/Description is **highlighted** and then **click** on this organization.

Note: The unit number for the organization being added cannot be used, since the organization doesn't exist yet. After the process to add this unit to the table is completed, modify the Unit Table to select this new organization as the **Default AO Unit**, if desired.

- **Default AO** - Any **individuals** with **AO privileges** for the unit shown at the **Default AO Unit** field will be **listed** at this field. **Point** and **click** on the desired name to make a selection.
- **Funds Type** - At this field a listing of various funding organizations is displayed. **Point** and **click** on the desired organization to make a selection.

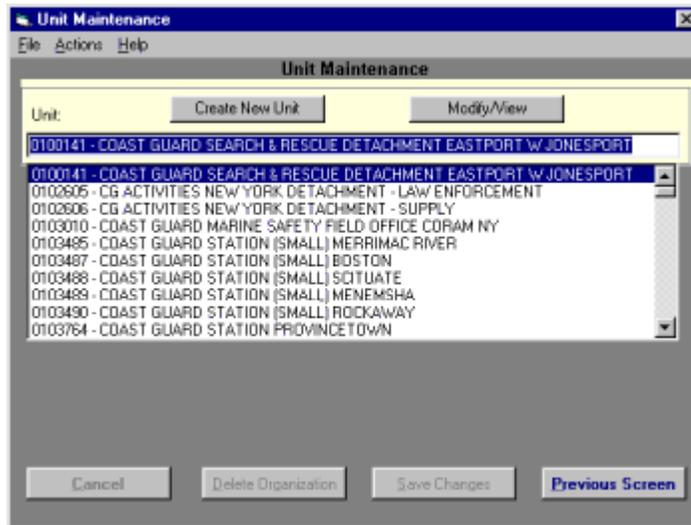
Tip: **Click** on the **Cancel** button if wishing to **abort** the input prior to saving the entries.

7. After entering the required information, **click** the **Save Changes** button.
8. When finished using the Unit Maintenance screen, **click** the **Previous Screen** button and **click** on **Yes** at the **Cancel This Screen** pop-up to return to the **UTS Maintenance** screen.

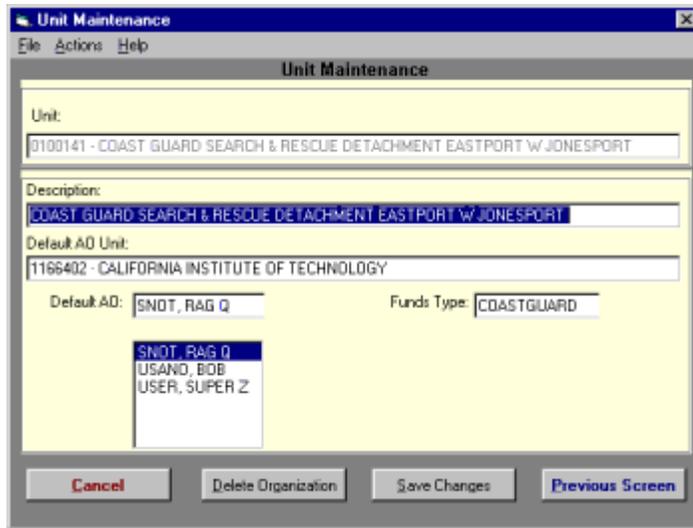
Modify or Delete Unit Information

Modify or Delete Unit Information:

1. **Login** to the UTS Maintenance Module as a **System Administrator**.
2. **Click** on the **Add/Modify Units** button. The **Unit Maintenance** screen appears.



3. At this screen, a drop down listing of **Unit Numbers** with a **Description** appears at the **Unit** field. Use any of the following methods to select a unit:
 - **Type** the unit number for the desired organization. When the desired Unit Number/Description is **highlighted**, click on this organization.
 - **Click** on the **Up/Down arrows** on the **right** side of the unit listing window until the desired Unit Number/Description is displayed, then **click** on this organization.
 - **Press** the **Up/Down arrows** on the keyboard until the desired Unit Number/Description is **highlighted** and then **click** on this organization.
4. After selecting a unit, by using either method described above, the following screen appears:



5. At this screen, the user may **remove** the unit from the table by clicking on the **Delete Organization** button, or modify the existing information displayed at the following fields:
 - **Description** - **Click** in this field, and enter a new description or modify the existing information as required.
 - **Default AO Unit** - **Click** in this field, and a listing of all of the organizations in the Units Table is displayed. Select a new unit by using any of the methods described in step (3) above.
 - **Default AO** - Any **individuals** with **AO privileges** for the unit shown at the **Default AO Unit** field will be **listed** at this field. **Point** and **click** on the desired name to make a selection.
 - **Funds Type** - At this field, a listing of various funding organizations is displayed. **Point** and **click** on the desired organization to make a selection.

Tip: **Click** on the **Cancel** button if wishing to **abort** the changes prior to saving the entries.
6. After modifying any existing information, **click** the **Save Changes** button.
7. When finished using the Unit Maintenance screen, **click** the **Previous Screen** button and **click** on **Yes** at the **Cancel This Screen** pop-up to return to the **UTS Maintenance** screen.

Importing Unit Data File

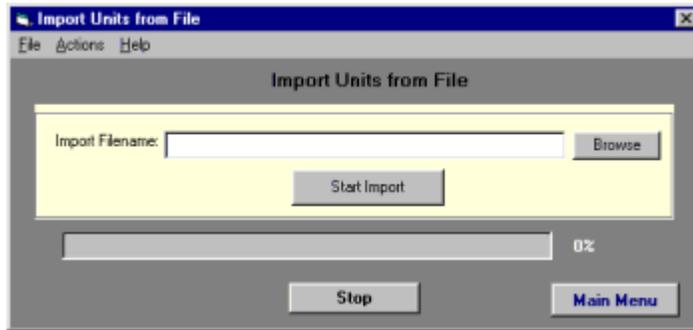
All organizations, having Coast Guard members or employees **assigned**, have been given a **Unit Number**. In addition, any organization that **funds** official travel for members or employees of the Coast Guard has also been assigned an **Unit Number**.

When a user account is established in UTS, this Unit Number becomes part of the traveler's **personal profile** and is used by UTS to associate **Travelers**, **Proxies**, and **Authorizing Officials**.

Unit information is stored in the **Unit Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated periodically, by PMIS-JUMPS.

 **Use the following procedures to import the Unit Data File:**

1. **Login** to the UTS Maintenance Module.
2. **Click** on the **Import - Update** button. The **Import Units from File** screen appears.



3. At this screen, enter the **path** where the import file can be located and the **filename** at the **Import Filename** field. For example; **A:\UNITS.XXX**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Unit Data file is located.

4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Units from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

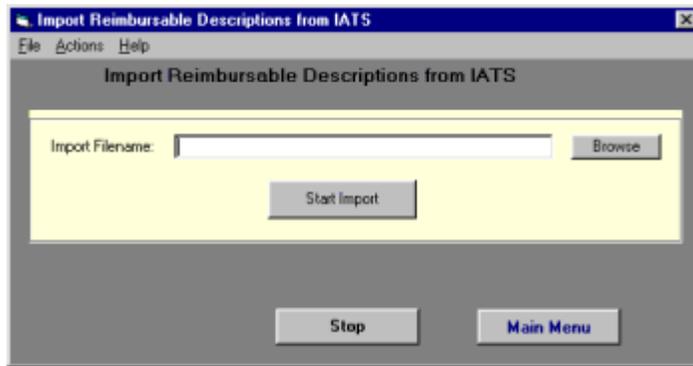
Importing Reimbursable Expense Descriptions

While processing a travel **authorization** or **settlement** using UTS, a pop-up table appears at the **Reimbursable Expenses** section when the cursor is positioned at the **Description** field.

The **Reimbursable Expense Descriptions** are stored in the **Reimbursable Expense Table**, which resides in the **UTS Maintenance Module**. This table can be populated and updated by importing the data from a file that is generated by **IATS**.

 **Use the following procedures to import the Reimbursable Expenses Data File:**

1. **Login** to the UTS Maintenance Module.
2. **Click** on the **Import Reimbursable Desc.** button. The **Import Reimbursable Descriptions from IATS** screen appears.



3. At this screen, enter the **path** where the import file can be located and the **filename** at the **Import Filename** field. For example; A:\EXPENSE.XXX.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the Reimbursable Expense Data file is located.

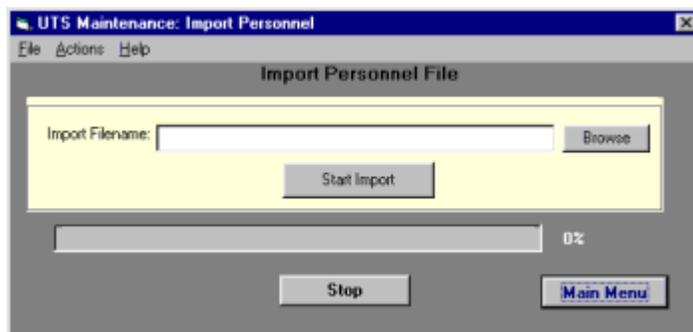
4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Reimbursable Descriptions from IATS** screen, **click** the **Main Menu** button to return to the UTS Maintenance screen.

Importing Personnel Data File

User accounts in the UTS database are automatically added and updated by importing a file containing personnel information.

 **Use the following procedures to import the Personnel file:**

1. **Login** to the UTS Maintenance Module.
2. At the UTS Maintenance screen, **click** on the **Import/Update Personnel** button. The **Import Personnel** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; A:\PERSONS.XXX.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the personnel file is located.

- Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
- When finished using the **Import Personnel** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing Accounting Data

Accounting Appropriations in the UTS database are automatically added and updated by importing a file containing accounting lines.

 Use the following procedures to import the Accounting file:

- Login** to the UTS Maintenance Module.
- At the **UTS Maintenance** screen, **click** on the **Import/Update Accounting** button. The **Import Accounting** screen appears.



- At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\RT200038.DAT**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

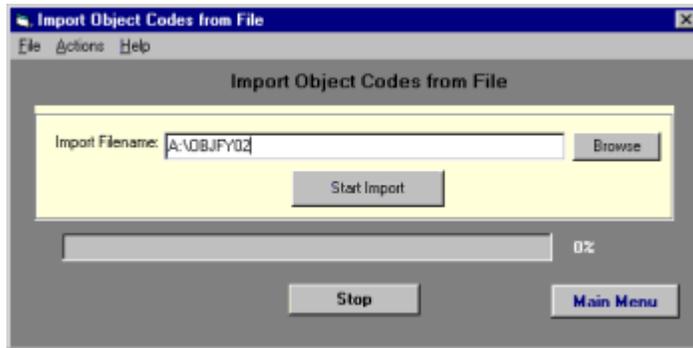
- Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
- When finished using the **Import Accounting** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing Object Codes

Object Codes in the UTS database are automatically added and updated by importing a file containing Object Codes by Fiscal Year.

Use the following procedures to import Object Codes:

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Import/Update Object Codes** button. The **Import Object Codes from File** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\OBJFY02**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

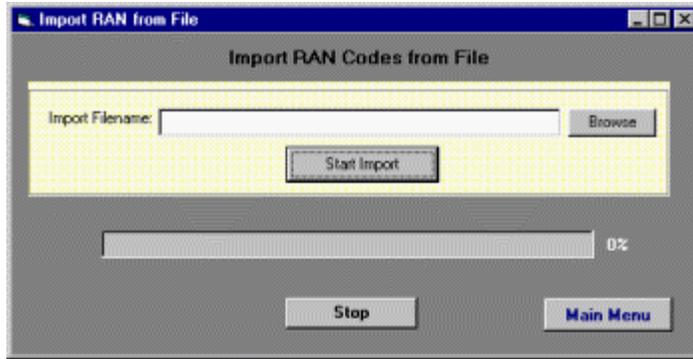
4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import Object Codes from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Importing RAN Codes

RAN Codes in the UTS database are automatically added and updated by importing a file containing RAN Codes.

Use the following procedures to import the RAN Codes file:

1. **Login** to the UTS Maintenance Module.
2. At the **UTS Maintenance** screen, **click** on the **Import/Update RAN Codes** button. The **Import RAN Codes from File** screen appears.



3. At this screen, enter the **path**, where the import file can be located, and the **filename** at the **Import Filename** field. For example; **A:\RAN00038.DAT**.

Note: If the correct path and filename is not known, **click** on the **Browse** button to search the various system drives and directories until the accounting file is located.

4. Once the correct path and filename is entered, **click** the **Start Import** button. UTS will begin importing the file. If it is necessary to terminate the process prior to completion, **click** the **Stop** button.
5. When finished using the **Import RAN Codes from File** screen, **click** the **Main Menu** button to return to the **UTS Maintenance** screen.

Personal Profiles

About Profile

A Personal Profile is a user account that is created for every individual who will use UTS and every traveler, who's claim is processed through UTS. This profile is used to store personal information for the user and establishes their privileges. Profiles can only be created or deleted by a user with **System Administrator** privileges.

The capabilities for a user to create, view, modify, or delete a personal profile varies according to their **View** or **Privilege** as follows:

- **Traveler** - May view, modify, or delete his/her own profile.
- **System Administrator** - May create, view, modify, or delete any personal profile.

Note: **Privileges** can only be modified by users with a **System Administrator** View.

Creating Profiles

Personal Profiles for UTS users or travelers are ordinarily created automatically by importing a personnel file. Profiles may also be created manually through the UTS **Maintenance** module by an individual possessing the **System Administrator** privilege.

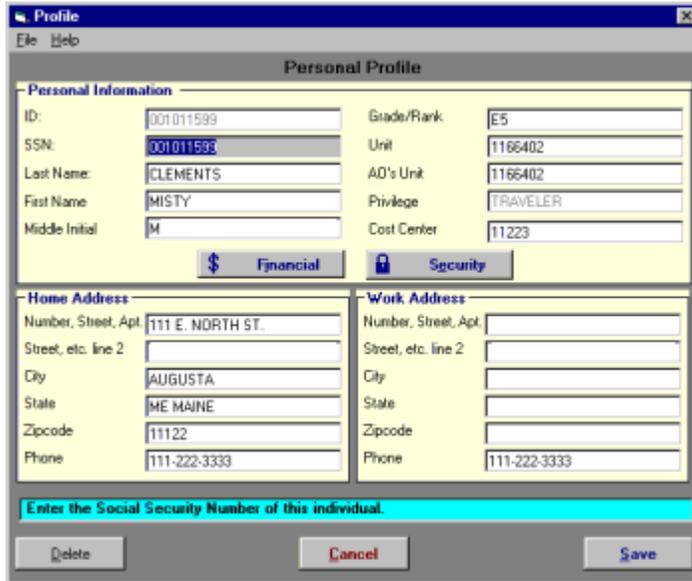
Manually creating a user Profile:

1. **Login** to the UTS Maintenance module.

2. Click on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears:



3. Click on the **Create New** button and the following **Profile** screen appears.

A screenshot of a software window titled "Profile". The window has a menu bar with "File" and "Help". The main content area is titled "Personal Profile" and contains several sections. The "Personal Information" section has fields for ID (001011599), Grade/Rank (E5), SSN (001011599), Unit (1166402), Last Name (CLEMENTS), AD's Unit (1166402), First Name (MISTY), Privilege (TRAVELER), Middle Initial (M), and Cost Center (11223). Below this section are two buttons: "Financial" (with a dollar sign icon) and "Security" (with a lock icon). The "Home Address" section has fields for Number, Street, Apt (111 E. NORTH ST.), Street, etc. line 2, City (AUGUSTA), State (ME MAINE), Zipcode (11122), and Phone (111-222-3333). The "Work Address" section has fields for Number, Street, Apt, Street, etc. line 2, City, State, Zipcode, and Phone (111-222-3333). At the bottom of the window, there is a blue bar with the text "Enter the Social Security Number of this individual." and three buttons: "Delete", "Cancel", and "Save".

4. Complete each section with the information needed to identify the user.
5. **Point** to the field you wish to access, **click** the left mouse button.
6. **Type** the required information.
7. When finished, press **Enter** or **Tab** to advance to the next field or **point** to the desired field and **click** the left mouse button.

Note: The **Work Address** section is optional and every field except **Phone** can be left **blank**.

Tip: Don't forget to **click** on the **Security** and **Financial** buttons and complete those screens also.

8. When finished completing the Personal Profile, Financial Information, and Security Information screens, **click** the **Save** button.

See Also

[Personal Information](#)

[Financial Information Screen](#)

[Security Information](#)

[Privileges](#)

[New Logon Password](#)

[New Secondary Password](#)

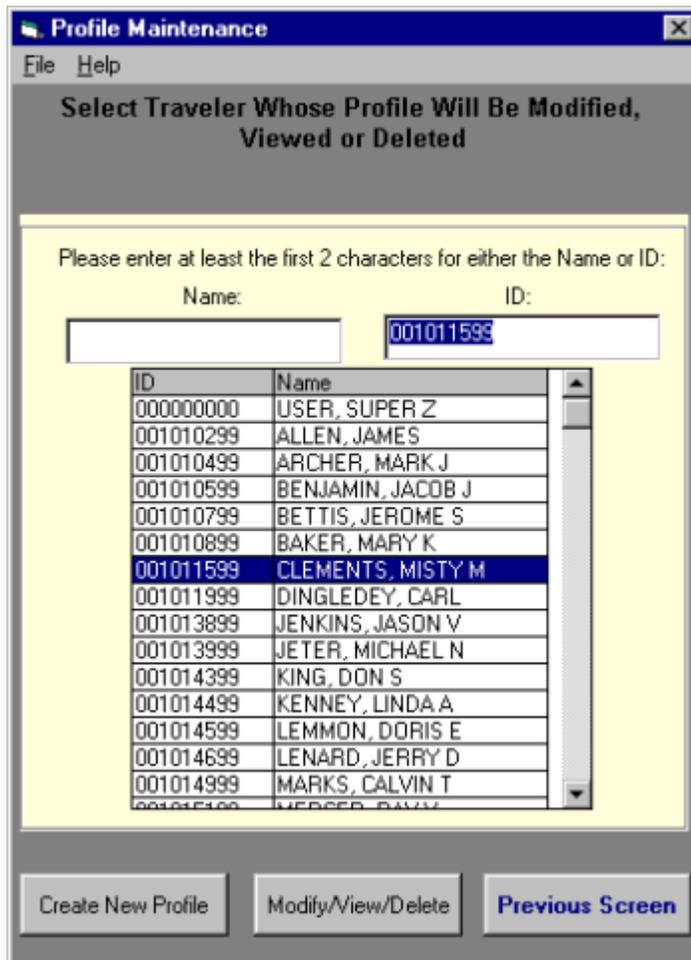
- Additional Information
- Authentication Information
- Modifying Profiles
- Deleting Profiles

Modifying Profiles

To modify a Personal Profile, the UTS user must login to UTS in either the **Traveler** or **System Administrator** View mode.

Modifying a Profile using the System Administrator View:

1. **Login** to the UTS **Maintenance** module.
2. **Click** on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears.



Profile Maintenance

File Help

Select Traveler Whose Profile Will Be Modified, Viewed or Deleted

Please enter at least the first 2 characters for either the Name or ID:

Name: ID: 001011599

ID	Name
000000000	USER, SUPER Z
001010299	ALLEN, JAMES
001010499	ARCHER, MARK J
001010599	BENJAMIN, JACOB J
001010799	BETTIS, JEROME S
001010899	BAKER, MARY K
001011599	CLEMENTS, MISTY M
001011999	DINGLEDEY, CARL
001013899	JENKINS, JASON V
001013999	JETER, MICHAEL N
001014399	KING, DON S
001014499	KENNEY, LINDA A
001014599	LEMMON, DORIS E
001014699	LENARD, JERRY D
001014999	MARKS, CALVIN T
001015199	MERGER, DAVID

Create New Profile Modify/View/Delete Previous Screen

3. At this screen, enter either the first (2) letters of the **last name** or the first (2) digits of the **Employee ID** for the profile being modified. Any profiles matching the criteria appear in the table.

- Click on the desired **profile**, then click the **Modify/View/Delete** button. The **Personal Profile** screen appears.

- At the **Personal Profile** screen, press **Enter** or **Tab** to advance through the input fields, or **point** to the desired field and click the **left** mouse button.
- Type** the required change.
- Click on the **Save** button when finished.

Modifying a Profile using the Traveler View:

- Login** to the **UTS Processing** module in the **Traveler View**. If logged in as a **Proxy** or **Authorizing Official**, click on the **Log in as** menu at the top of the **UTS Request Status** screen and change the View to **Traveler**.
- At the **UTS Request Status** screen, click on the **Profile** menu.



- At the **Profile** drop down menu, click on the **Modify or View Profile** option.
- At the **Personal Profile** screen, press *Enter* or *Tab* to advance through the input fields, or **point** to the desired field and click the **left** mouse button.
- Type** the required change.
- Click on the **Save** button when finished.

Tip: It may be necessary to click on the **Security** and **Financial** buttons and make changes at those screens also.

See Also

[Personal Information](#)

[Financial Information Screen](#)

[Security Information](#)

[Privileges](#)

[New Logon Password](#)

[New Secondary Password](#)

[Additional Information](#)

[Authentication Information](#)

Deleting Profiles

Personal Profiles may only be deleted by users with **System Administrator** privileges.

Deleting a Profile:

1. **Login** to the **UTS Maintenance** module.
2. **Click** on the **Profiles: Add/Update/Delete** button and the **Profile Maintenance** screen appears.

Profile Maintenance

File Help

Select Traveler Whose Profile Will Be Modified, Viewed or Deleted

Please enter at least the first 2 characters for either the Name or ID:

Name: ID:

ID	Name
000000000	USER, SUPER Z
001010299	ALLEN, JAMES
001010499	ARCHER, MARK J
001010599	BENJAMIN, JACOB J
001010799	BETTIS, JEROME S
001010899	BAKER, MARY K
001011599	CLEMENTS, MISTY M
001011999	DINGLEDEY, CARL
001013899	JENKINS, JASON V
001013999	JETER, MICHAEL N
001014399	KING, DON S
001014499	KENNEY, LINDA A
001014599	LEMMON, DORIS E
001014699	LENARD, JERRY D
001014999	MARKS, CALVIN T
001015199	MERCEP, DANNY

Create New Profile Modify/View/Delete Previous Screen

- At this screen, enter either the first (2) letters of the **last name** or the first (2) digits of the **User ID** for the profile being modified. Any profiles matching the criteria appear in the table.
- Click on the desired **profile**, then click the **Modify/View/Delete** button. The **Personal Profile** screen appears.

Profile

File Help

Personal Profile

Personal Information

ID: Grade/Rank:

SSN: Unit:

Last Name: Privilege:

First Name:

Middle Initial:

Home Address

Number, Street, Apt: Street, etc. line 2:

City: State:

Zipcode: Phone:

Work Address

Number, Street, Apt: Street, etc. line 2:

City: State:

Zipcode: Phone:

Enter the Social Security Number of this individual.

-
5. At the **Personal Profile** screen, click the **Delete** button.

Personal Information

Enter the information needed to identify the Traveler:

1. **ID:** Enter the traveler's **Employee ID number** to be used for logging into UTS. This number must be (9) numeric characters.
2. **SSN:** Enter the traveler's **Social Security Number**. When entering this number, do not use **spaces** or **dashes**. This field must also be (9) numeric characters.
3. **Last Name:** Enter the traveler's last name.
4. **First Name:** Enter the traveler's first name.
5. **Middle Initial:** Enter the traveler's middle initial. (**Optional**).
6. **Grade/Rank:** At this field, a table appears listing the pay grades **CIV, E1-E9, O1-O10, W1-W5, O1E-O3E, GS1-GS16, GM1-GM16, WG1-WG16** and **WS1-WS16**. Either **type** the traveler's pay grade or **click** the *Up/Down arrow* buttons until the desired pay grade is displayed. Place the pointer on the desired pay grade and **click** the left mouse button to make a selection.
7. **Unit:** Enter the (7) digit **number** representing the unit or agency the traveler is assigned to.
8. **AO's Unit:** Enter the (7) digit **number** representing the unit or agency the traveler's **Authorizing Official** is assigned to.
9. **Privilege:** When creating a traveler profile, the default privilege is **Traveler**. To change the **privilege**, **click** on the **Security Information** button.
10. **Cost Center:** Enter the (5) digit **number** representing the **Cost Center** associated to the traveler's assigned Unit.

Note: The **Privileges** section can only be accessed by the **System Administrator**.

Home Address

A Home Address must be entered into the **Home Address** section of the **Personal Profile** screen for every profile created.

-- Home Address	
Number, Street, Apt.	111 S. EAST ST.
Street, etc. line 2	
City	INDIANAPOLIS
State	IN INDIANA
Zipcode	46223
Phone	317-333-4444

 **Enter the required information at each field to complete the Home Address section.**

1. **Point** to the field you wish to access, **click** the left mouse button and the color changes to **gray**.
2. **Type** the required information.
3. When finished, press **Enter** or **Tab** to advance to the next field or **point** to the desired field and **click** the left mouse button.

Tip: At the **State** field, a drop down listing appears. **Click** the *up/down* arrows on the right side of the listing until the desired state or country name appears. **Click** on the **name** to populate the **State** field.

Note: **Address line 2** and the **Phone** fields are **optional**. These fields may be left blank.

Work Address

With the exception of a **Work Phone Number**, the Work Address is **optional**, when creating a user profile. It is always a good idea, however, to obtain as much information as possible in case it is necessary to route documentation through the traveler's office.

- Work Address	
Number, Street, Apt.	<input type="text"/>
Street, etc. line 2	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zipcode	<input type="text"/>
Phone	317-555-1212

 **Enter the required information at each field to complete the Work Address section.**

1. **Point** to the field you wish to access, **click** the left mouse button and the color changes to **gray**.
2. **Type** the required information.
3. When finished, press *Enter* or *Tab* to advance to the next field or **point** to the desired field and **click** the left mouse button.

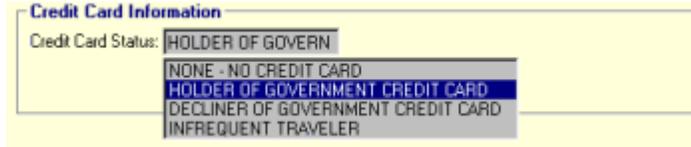
Tip: At the **State** field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired state or country name appears. **Click** on the **name** to populate the **State** field.

Note: The **Phone** field cannot be left blank. A work phone number is **mandatory** when creating a user profile.

Financial Information

Credit Card Information

The **Credit Card Information** section of the Financial Information screen is used to **identify** whether the traveler is participating in the **Government Charge Card Program**.



The screenshot shows a dropdown menu titled "Credit Card Information". The current selection is "HOLDER OF GOVERN". The dropdown list is open, showing the following options: "NONE - NO CREDIT CARD", "HOLDER OF GOVERNMENT CREDIT CARD" (which is highlighted in blue), "DECLINER OF GOVERNMENT CREDIT CARD", and "INFREQUENT TRAVELER".

 **Enter the following Information to complete the Credit Card Information section:**

1. Make the appropriate **selection** to identify the traveler's credit card status:
 - **Credit Card Status** - At this field, a drop down listing appears displaying several options. **Point** and **click** on the desired **option** to make a selection.
2. When finished making a selection, **click** the **Previous Screen** button.
3. At the **Personal Profile** screen, **click** the **Save** button to save the credit card information.

Security Information

Click the **Security Information** button on the **Personal Profile** screen and the Security Information screen appears: This screen is used to capture the information needed to grant access to the UTS program.

The screenshot shows a window titled "Profile - Security Options" for user "FARRIS, DAVID O". The "Security Information" section contains several input fields and checkboxes. The "Privileges" section has "Authorizing Official" and "Systems Administrator" checkboxes, both of which are currently unchecked. The "New Logon Password" and "New Secondary Password" sections each have "Enter" and "Re-enter" fields. The "Authentication Information" section has "Mother's Maiden Name", "Date of Birth", and "Town of Birth" fields. The "Additional Information" section has "Default Authorizing Officer" (filled with "ALLEN, JAMES E"), "Signature Proxy" (filled with "BETTIS, JEROME"), "Office Email Address", and "Home Email Address" fields. A red error message at the bottom of the form reads "Please enter your mothers maiden name." Below the form are "Cancel" and "Previous Screen" buttons.

At this screen, the **Traveler** or **System Administrator** must enter the appropriate information to complete each section.

 The following links provide detailed information for completing these sections:

- [Privileges](#)
- [New Logon Password](#)
- [New Secondary Password](#)
- [Authentication Information](#)
- [Additional Information](#)

Privileges

Privileges are associated with the **View** Modes. The privilege or view identifies what **capabilities** and **access** the user possesses. When a user profile is created, the default privilege is **Traveler**. A user can be granted **more** than one privilege, however.

This close-up shows the "Privileges" section of the form. It contains two checkboxes: "Authorizing Official" with a checked box, and "Systems Administrator" with an unchecked box.

Note: The Privileges for **Authorizing Official**, or **System Administrator**: can only be added or changed by a **System Administrator**.

Changing or Adding Privileges:

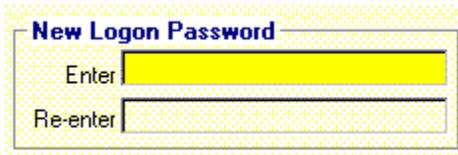
1. **Login** to the UTS **Maintenance** Module.
2. At the **UTS Maintenance Menu**, click on the **Profiles: Add/Update/Delete** button.
3. The next screen to appear requires the System Administrator to **select** a traveler. At this screen, **enter** either the first (2) letters of the **last name** or the first (2) digits of the **Employee ID** for the profile being modified. Any profiles matching the criteria appear in the table.
4. **Click** on the desired **profile**, then **click** the **Modify/View/Delete** button. The **Personal Profile** screen appears.
5. At the Personal Profile screen, **click** the **Security Information** button.
6. At the **Security Information** screen, press *Enter*, *Tab*, or use the *left* and *right arrow* keys to highlight the desired privilege.
7. **Point** to the desired or highlighted option and **click** the left mouse button. A **check mark** appears next to the selected privilege.

Tip: Clicking on a privilege that has a **check mark** causes the check mark to **disappear** and **deselects** the privilege.

New Logon Password

The New Logon Password section is used to establish a unique Logon Password for every user who will access UTS.

Tip: The Logon Password must be (8) characters. In addition, (2) of the characters must be **numeric**.



The image shows a screenshot of a software interface for setting a new logon password. The window title is "New Logon Password". There are two text input fields. The first field is labeled "Enter" and is highlighted with a yellow background. The second field is labeled "Re-enter".

At the **Enter** field, **type** the **Password** the user will enter when logging into UTS. After typing the password and pressing *Enter*, the user is required to type the password a second time at the **Re-enter** field.

Note: Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

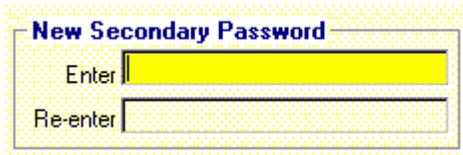
See Also

[Changing Passwords](#)

New Secondary Password

The Secondary Password serves as the **electronic signature** for releasing travel authorizations and settlements for further processing. A Secondary Password must be created before a user is able to login to UTS.

Tip: The Secondary Password must be (8) characters. In addition, (2) of the characters must be **numeric**.



The screenshot shows a form titled "New Secondary Password". It contains two input fields: "Enter" and "Re-enter". The "Enter" field is highlighted in yellow, indicating it is the primary field for password entry.

At the **Enter** field, type the **Secondary Password** the user will type when releasing travel authorizations and settlements. After typing the password and pressing *Enter*, the user is required to type the password a second time at the **Re-enter** field.

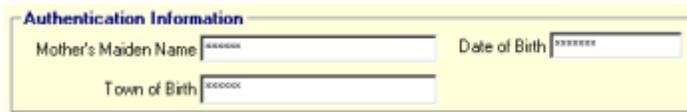
Note: Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

See Also

[Changing Passwords](#)

Authentication Information

The Authentication Information section of the Security Information screen is used to verify a users access to the UTS program. When logging into UTS, the user is required to enter a **password** at the UTS Password screen. If the user cannot remember their password, **access** can be gained by **clicking** on the **Forgot my Password** button and entering the **authentication information**. If this information matches the authentication information previously entered into the UTS database, access is granted.



The screenshot shows a form titled "Authentication Information". It contains three input fields: "Mother's Maiden Name", "Date of Birth", and "Town of Birth". The "Date of Birth" field is highlighted in yellow.

At this screen enter the following information:

- Mother's Maiden Name
- Date of Birth
- Town of Birth

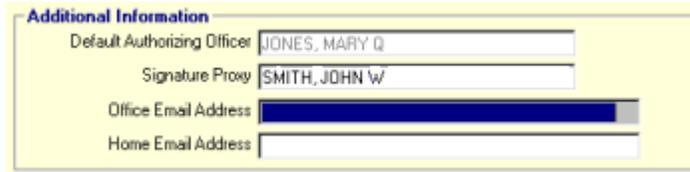
See Also

[Logging into UTS](#)

[Forgot my Password](#)

Additional Information

The additional Information section is used to establish who is designated as an **Authorizing Official** to approve travel actions. This section is also used to establish who can act as a **Signature Proxy** on behalf of the Traveler.



- **Default Authorizing Officer:** At this field, a listing of **Names** appears for individuals possessing **AO** privileges for the Traveler's unit. **Point** to the desired name and **click** the left mouse button to make a selection.
- **Signature Proxy:** Any individual belonging to the same unit as the Traveler, may be designated as a Signature Proxy on behalf of the Traveler. At this field, the user must enter the first (2) letters of the desired Signature Proxy's **last name**. A listing of **Names**, beginning with the two letters entered, appears. If the desired name is highlighted, press **Enter**. If the desired name is not highlighted, **click** the *Up/Down* arrows on the keyboard to scroll through the list until the correct name appears.
- **Office Email Address:** Enter an email address at this field in order to **send/receive** UTS generated **notifications** that a **Request for Authorization, Advance, or Settlement** has been **forwarded** to the **AO, Traveler, or Proxy**.
- **Home Email address:** For future use.

Changing Passwords

Passwords should only be **known** by the individual user. If the passwords were **initially** created by the **System Administrator**, users should change their passwords after accessing UTS for the **first** time.

Complete the following steps to change a Logon or Secondary Password:

1. Login to UTS. If the **View** mode displayed on the **UTS Request Status** or **UTS Requests Requiring Action** screen is other than **Traveler**, change the view to **Traveler** to continue.
2. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, **click** on the **Profile** menu.
3. At the Profile drop down menu, **click** on **Modify or View Profile**.
4. At the **Personal Profile** screen, **click** on the **Security Information** button.
5. At the **Security Information** screen, press **Enter** or **Tab** to advance through the input fields or **point** and **click** on the **Enter** field at the **New Logon Password** or **New Secondary Password** sections.



The image shows two side-by-side form boxes. The left box is titled 'New Logon Password' and contains two input fields: 'Enter' and 'Re-enter'. The 'Enter' field is highlighted in yellow. The right box is titled 'New Secondary Password' and also contains two input fields: 'Enter' and 'Re-enter'.

6. **Type** a new Logon or Secondary Password and press *Enter*.
7. At the **Re-enter** field, **type** the new Logon or Secondary Password and press *Enter*.
8. **Click** on the **Previous Screen** button when finished.
9. At the **Profile** screen, **click** the **Save** button.

See Also

[Changing View](#)

Views

About Views

The Unit Travel System (UTS) can be operated in one of **four** different view modes. The various view modes are used to determine what **privileges** and **capabilities** the user possesses. View modes are associated to the users **profile** and are established by the **System Administrator**.

When a user account is created, the **default** view is **Traveler** unless the System Administrator gives the user Authorizing Official or System Administrator privileges.

Note: Any user can change their view to **Proxy** and perform services on behalf of any other Traveler sharing the same unit number.

Tip: A View can also be defined as the user's **Privilege**.

See Also

[Changing Views](#)

[About Profiles](#)

[About Travelers](#)

[About Proxies](#)

[About Authorizing Officials](#)

[About System Administrators](#)

View Modes

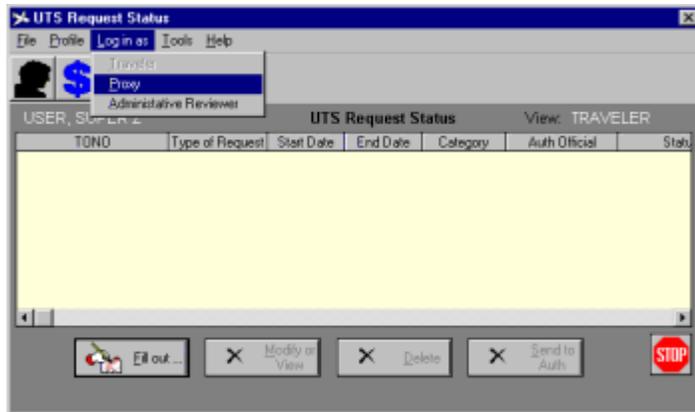
Traveler, Proxy, Authorizing Official, System Administrator

Changing View

When a **Personal Profile** is created, a user may be given privileges for several different **View** modes. In order to perform the functions associated with a particular view, however, it may be necessary to change the View after logging into UTS.

Complete the following steps to change a View mode:

1. Login to UTS. Notice that the type of View is displayed at the **View** field on the **UTS Request Status** or **UTS Requests Requiring Action** screen.
2. **Click** on the **Log in as** menu. A drop down menu appears listing the various view modes that the user has privileges for.



3. Click on the **View** mode you wish to use.
4. The new mode will appear at the **View** field.

See Also

[View Modes](#)

[About Travelers](#)

[About Proxies](#)

[About Authorizing Officials](#)

[About System Administrators](#)

Traveler

About Travelers

The **Traveler** View mode is used by individuals who perform travel on behalf of the US Government and will use UTS to process their requests for advance or reimbursement of travel expenses. When logged into UTS in the Traveler View, the user has the ability to generate a variety of travel actions.

By clicking on the **File** menu at the **UTS Request Status** screen and then selecting the **Create** option, the following drop down menu appears. The user may then select the desired action.



Travelers will use UTS to **initially** request a **travel authorization** and then a subsequent request for **advance**, or **settlement** at the **conclusion** of the trip.

See Also

[About Travel Authorizations](#)

[About Travel Orders](#)

[About Travel Advances](#)

[About Travel Settlements](#)

[About Local 1164 Travel](#)

Proxy

About Proxy

There are **two** different **Proxy** capabilities that can be established within UTS.

- Agency Proxy
- Signature Proxy

Agency Proxy

Any individual possessing an active UTS user account may act as a Proxy for requesting travel actions on the behalf of any traveler within the same organization. When logged into UTS in the **Proxy** view, the user has the ability to initiate a variety of travel actions for any other individual assigned to the same **unit**. The Agency Proxy completes the initial request on the behalf of the traveler, but cannot release the action for further processing. The action may only be released by the **Traveler** or the **Signature Proxy**.

By clicking on the **File** menu and then selecting the **Create** option at the UTS Request Status screen, the following drop down menu appears. The Agency Proxy may then select the desired option.



Note: Requests for **authorizations** and **settlement** actions completed by the **Agency Proxy** are returned to the traveler to be released to the **AO** for approval.

Signature Proxy

Occasionally, a traveler may be unable or unavailable to access UTS to release their own requested travel action. When this situation is anticipated, or simply as a precaution, a traveler may designate another individual as a **Signature Proxy**. Signature Proxies have the same capabilities as Agency Proxies to request or complete various travel actions for other individuals. In addition, settlement actions released by the Signature Proxy are electronically signed on behalf of the traveler and forwarded to the Authorizing Official.

Note: A **Signature Proxy** acts on the behalf of the **Traveler** and has the same capabilities.

See Also

[Designating an Agency Proxy](#)

[Designating a Signature Proxy](#)

Designating an Agency Proxy

No special action is required to designate an individual to be an **Agency Proxy** for a particular unit. All personnel who are authorized to use UTS may perform Proxy services for any other individual assigned to the same Unit.

To perform Proxy services, however, an individual must change their view to **Proxy** after logging into UTS.

See Also

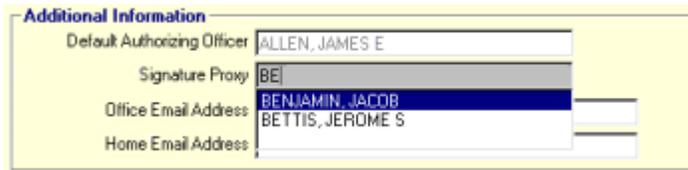
[Changing View](#)

Designating a Signature Proxy

When necessary, **Travelers** may designate another individual to act as a **Signature Proxy** for initiating and releasing travel actions on their behalf.

 **Complete the following steps to designate a Signature Proxy:**

1. Login to UTS in the **Traveler** view mode or change the view to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Profile** menu.
3. At the Profile drop down menu, **click** on **Modify or View Profile**.
4. At the **Personal Profile** screen, **click** on the **Security** button.
5. At the **Security Information** screen, **click** the **Signature Proxy** field.



Additional Information	
Default Authorizing Officer	ALLEN, JAMES E
Signature Proxy	BE BENJAMIN, JACOB BETTIS, JEROME S
Office Email Address	BETTIS, JEROME S
Home Email Address	

6. At the Signature Proxy field, the user must enter the first (2) letters of the desired Signature Proxy's **last name**. A listing of **Names**, beginning with the two letters entered, appears. If the desired name is highlighted, press **Enter**. If the desired name is not highlighted, **click** the *Up/Down* arrows on the keyboard to scroll through the list until the correct name appears...
7. When the desired name is highlighted, press **Enter** to make the selection.
8. When finished, **click** the **Previous Screen** button.
9. At the **Personal Profile** screen, **click** the **Save** button.

See Also

[About Proxies](#)

Authorizing Official

About Authorizing Officials

Authorizing Officials (AO's) are individuals who have been designated to **approve** requests for travel **authorizations, advances, and settlements** for a specific **organization** or individual **traveler**. This designation is generally pre-determined and incorporated into the UTS database when the personnel file is imported. AO's may also be designated by the UTS System Administrator.

When **units** and **personnel** are added to the UTS database, a **default** AO is established. UTS **System Administrators** have the ability to **change** or **reassign** the default AO's as required.

When travelers are **forwarding** their requests to the AO for approval, they have the ability to select a **different** AO if necessary.

A request for **advance** or **settlement** cannot be **processed** until a travel authorization has been **approved** by an AO or there is an approved travel order in the UTS database.

Requests for **advances** and **settlements** cannot be **transmitted** to the Integrated Automated Travel System (IATS) for computation until **approved** by an AO.

See Also

[Approving Requests](#)

[Returning Requests](#)

[Forwarding Requests](#)

Approving Requests

A request for **advance** or **settlement** cannot be **processed** without one of the following:

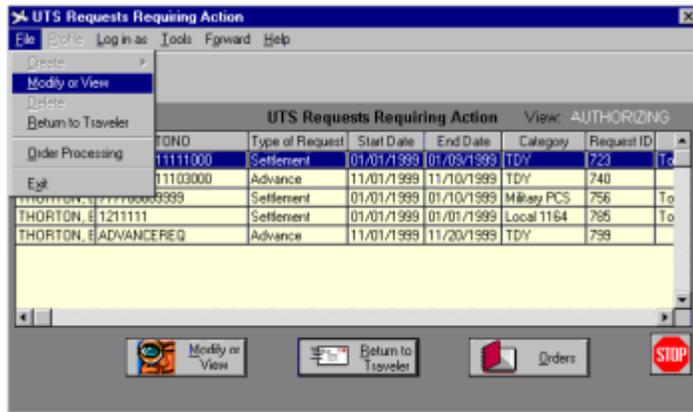
- A UTS created **Travel Authorization** approved by an AO.
- A **Travel Order**, for the associated claim, in the UTS database.

In addition, requests for **advances** and **settlements** cannot be **transmitted** to the Integrated Automated Travel System (IATS) for computation until **approved** by an AO.

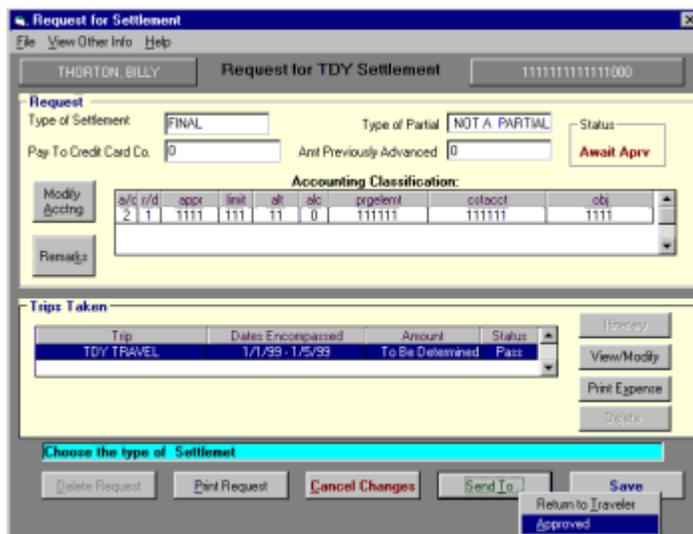
After travel requests are processed by a **Traveler** or **Proxy**, they must be **released** to an **AO** for approval. Once released, AO's approve travel requests by logging into UTS in the Authorizing Official view, selecting the transactions, and reviewing the entries. The AO can then either **approve** the transactions or **return** them to the source.

Complete the following steps to approve a Travel Request:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.



- Once a transaction is selected, either **click the Modify or View button**, or **click the File menu and then click on the Modify or View option**. Depending on the type of transaction selected, either the **Request for Authorization** or **Request for Settlement** screen appears.



- At either the **Request for Authorization** or **Request for Settlement** screen, the AO must review the entries and then **click the Send To button**.
- After clicking on the **Send To** button, a pop-up appears with the choices Return to Traveler or Approved. **Click on Approved**.
- A screen appears next requiring the AO to enter a **confirmation password**. This is the **Secondary Password** that was created when the AO's **Personal Profile** was created. **Enter** the confirmation password and **click the Done** button.

See Also

[Returning Requests](#)

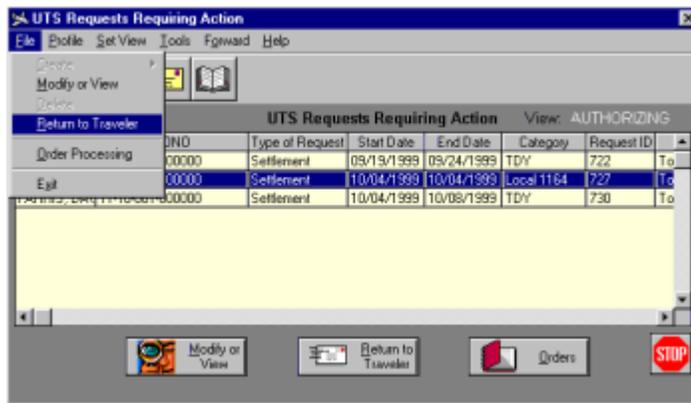
[Forwarding Requests](#)

Returning Requests

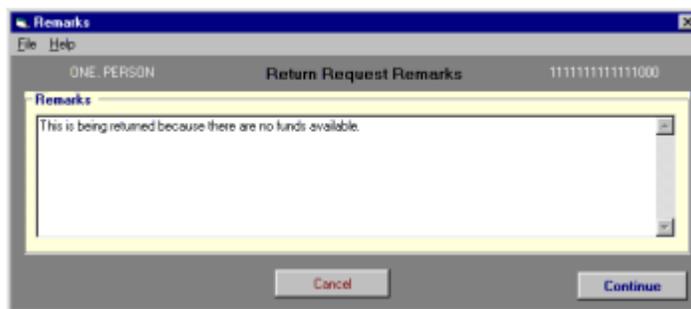
Rather than approving a requested travel action, an AO may elect to **return** the request to the traveler. The request could be **disapproved** or **corrections** may be required prior to approval.

Complete the following steps to Return a travel request:

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.



3. Once a transaction is selected, there are **(3)** methods for returning travel request:
 - **Method 1:** - Click the **Return to Traveler** button.
 - **Method 2:** - Click the **File** menu and then **click** on the **Return to Traveler** option.
 - **Method 3:** - Click the **Modify or View** button. Depending on the type of transaction selected, either the Request for Authorization or Request for Settlement screen appears. At this screen, the AO must review the entries and then **click** the **Send To** button. After clicking on the Send To button, a pop-up appears with the choices Return to Traveler or Approved. **Click** on **Return to Traveler**.
4. After using one of the methods described above, UTS displays the **Remarks** screen. At this screen, the AO can enter an **explanation** as to why the request is being return and what action is required.



5. **Enter** the desired remark and **click** the **Continue** button. UTS returns the request.

See Also

[Approving Requests](#)

[Forwarding Requests](#)

Forwarding Requests

If an AO knows that he/she will be **unavailable** to process travel requests during a certain period, UTS provides a feature that allows the AO to automatically or manually forward all incoming requests to **another** AO. This could occur if an AO is going on **vacation** or **TDY**.

Note: Forwarding can be done **automatically** by UTS or **manually** by the original AO.

- **Automatic Forwarding** is done through the **Enable Forwarding** option. When Forwarding is enabled, UTS automatically routes travel requests released to the **original** AO to the **designated** AO for a specified period. Only requests that are released after Forwarding is enabled are affected. Any requests that have already been released and are pending action by the AO, must be manually forwarded.
- **Manual Forwarding** is done by the **original** AO by using the **Forward This Request** or **Forward all Requests** options.

 **The following links provide detailed instructions on how to Forward requests:**

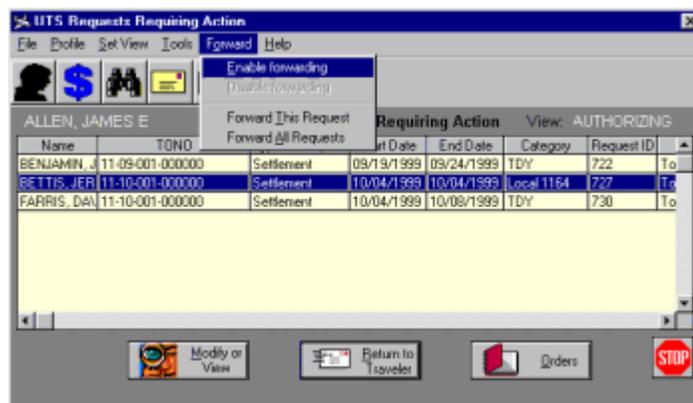
[Automatic Forwarding](#)

[Manual Forwarding](#)

Automatic Forwarding

 **Complete the following steps to Enable Automatic Forwarding:**

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.

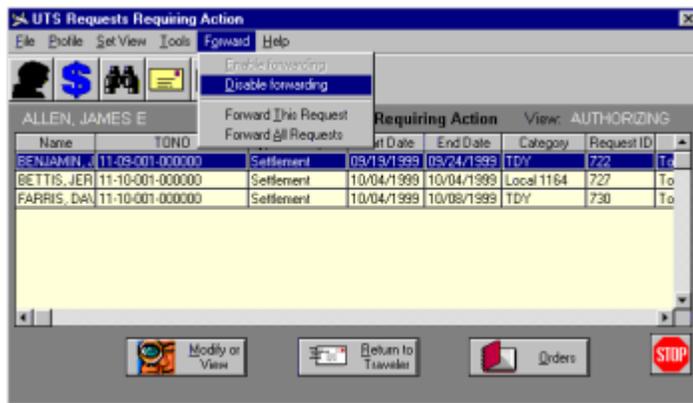


2. At the **UTS Requests Requiring Action** screen, **click** on the **Forwarding** menu and then **click** on the **Enable Forwarding** option.

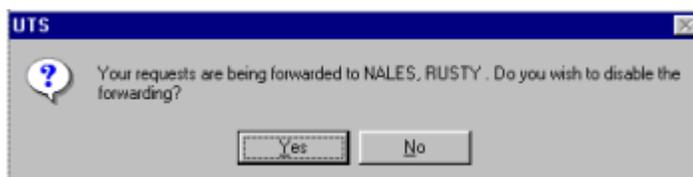
3. After clicking the Enabling option, a screen appears requiring the AO to specify the period and select a new AO. Enter the required information in the following fields to complete this screen:
 - **Effective Starting Date** - The current date defaults to this field. **Enter** a new **date**, or **press** the **Tab** key to continue.
 - **Effective Ending Date** - The current date defaults to this field. **Enter** a new **date**, or **press** the **Tab** key to continue.
 - **New AO** - **Click** in the **New AO** field and a drop down **listing** of possible AO's appears. **Point** and **click** on the desired AO to make a selection.
4. After selecting a new AO, **click** the **Done** button.
5. A pop-up appears indicating the **name** of the new AO requests will now be forwarded to. **Click** **OK** to complete the process.

 **Complete the following steps to Disable Automatic Forwarding:**

1. Login to UTS in the **Authorizing Official** view, or change the view to AO if necessary.



2. At the **UTS Requests Requiring Action** screen, **click** on the **Forward** menu and then **click** on the **Disable Forwarding** option.



3. A pop-up appears indicating the name of the AO the requests are **currently** being forwarded to and whether this option should be disabled. **Click** on the **Yes** button.

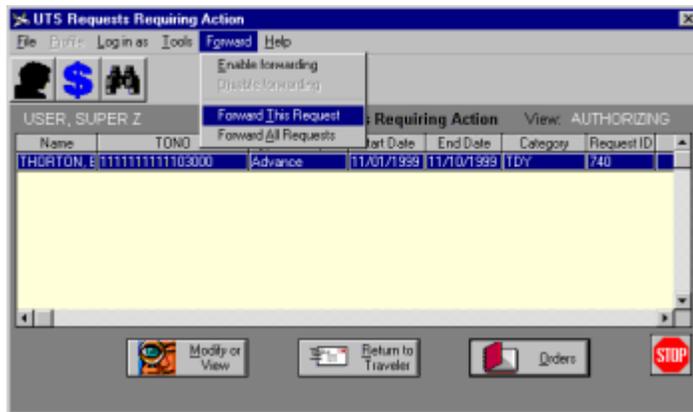
See Also

[Manual Forwarding](#)

Manual Forwarding

 **Complete the following steps to Manually Forward requests.**

1. Login to UTS in the **Authorizing Official** view or change the view to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, any transactions **pending approval** by the AO are **displayed** in the Claims List. **Point** and **click** on the desired transaction.



3. Once a transaction is selected, **click** the **Forward** menu and then **click** on either the **Forward This Request** or **Forward all Requests** options.
4. After selecting one of the manual forwarding options, a screen appears requiring the AO to specify which new AO the requests should be sent to. **Click** in the **New Authorizing Official** field and a drop down **listing** of possible AO's appears. **Point** and **click** on the desired AO to make a selection.



5. After selecting a new AO, click the **Done** button.

See Also

[Automatic Forwarding](#)

System Administrator

About System Administrators

UTS System Administrators have **exclusive** access to the UTS **Maintenance** Module. Only users with this privilege can log into this module.

As a System Administrator (**SA**), the user has the ability to **create** user **accounts** manually and assign **privileges**. In addition to creating accounts, the SA can also modify or delete them. The SA is also responsible for **importing** data files to update various tables and **creating** export files to interface with the travel computation system (**IATS**).

The System Administrator designation is generally pre-determined and incorporated into the UTS database when the personnel file is imported. A System Administrator can also **grant** the SA **privilege** when **creating** or **modifying** user **profiles**.

 **The following links provide detailed instructions for performing the various System Administrator functions:**

[Exporting Claims](#)

[Maintaining User Accounts](#)

[Maintaining City Names and Rates](#)

[Reassigning Authorizing Officials](#)

[Maintain Ships Table](#)

[Establish Miscellaneous Parameters](#)

[Maintaining Units](#)

[Importing Unit Data](#)

[Importing Reimbursable Exp. Descriptions](#)

[Importing Personnel Data](#)

[Importing Accounting Data](#)

Travel Authorizations

About Travel Authorizations

A Travel Authorization is the basis for reimbursement of travel expenses. An Authorization **outlines** the details of the trip and **requests** the various items necessary for the accomplishment for the mission. In addition, an Authorization provides the funding information necessary for reporting the obligation and expenditure to the accounting system.

- A Travel Authorization must be initiated by either the **Traveler, Agency Proxy, or Signature Proxy**.
- After a Travel Authorization is created, it must be released to the Authorizing Official for approval.
- A request for advance or settlement cannot be processed unless there is an approved Travel Authorization or Travel Order in the database.

See Also

[Creating Travel Authorizations](#)

[Canceling Travel Authorizations](#)

[Saving Travel Authorizations](#)

[Releasing Travel Authorizations](#)

[Deleting Travel Authorizations](#)

[Printing Travel Authorizations](#)

[Viewing Travel Authorizations](#)

[Modifying Travel Authorizations](#)

[About Travel Orders](#)

Creating Travel Authorizations

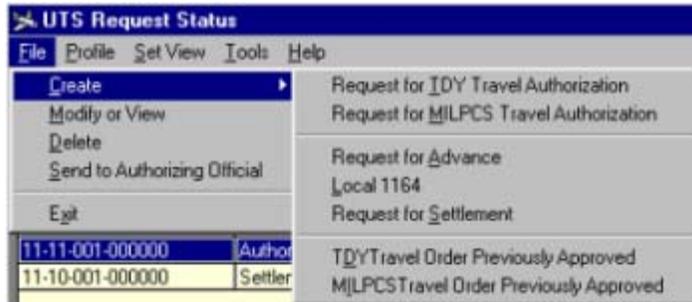
A Travel Authorization must be initiated by either a **Traveler, Agency Proxy, or Signature Proxy**. Without an approved Travel Authorization or Travel Order in the database, a request for advance or settlement cannot be processed.

Creating a Travel Authorization as a Traveler:

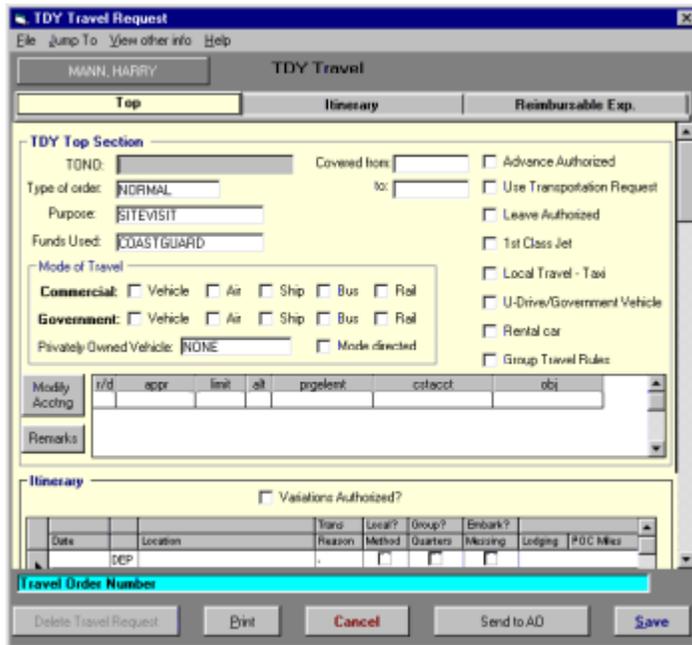
1. Login to UTS in the **Traveler** mode or [change the view](#) to Traveler if necessary.
2. At the **UTS Request Status** screen, there are two ways to initiate a **Request for TDY or MILPCS Travel Authorization**:

- Click on the **Fill out** button.
- Click on the **File** menu and then point to the **Create** option.

If either of these two options is used, a drop down menu appears listing a variety of travel actions.



3. Click on either the **Request for TDY** or **MILPCS Travel Authorization** option. The **TDY** or **MILPCS Travel Request** screen appears.



Note: The TDY Travel Request screen consists of (3) sections; **Top**, **Itinerary**, and **Reimbursable Exp.** The MILPCS Travel Request screen consists of (4) sections. **Top**, **Dependents**, **Itinerary**, and **Reimbursable Exp.**

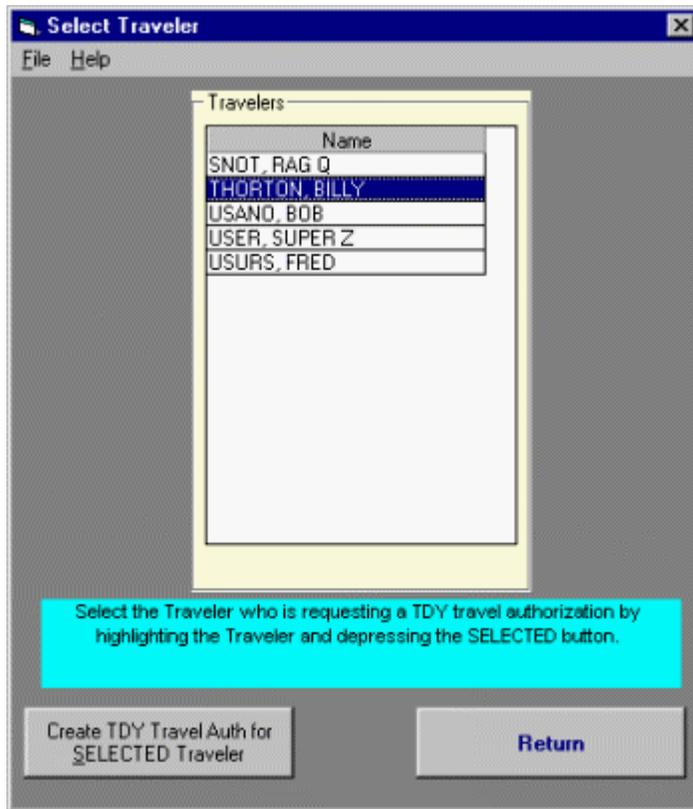
4. Enter the required information in each applicable section to create the request for authorization. Refer to the **links** listed under the “**See Also**” heading below for additional instructions.

Creating a Travel Authorization as a Proxy:

1. Login to UTS in the **Proxy** mode or change the view to Proxy if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **TDY** or **MILPCS Travel Request** screen:
 - Click on the **Fill out** button.
 - Click on the **File** menu and then point to the **Create** option.

If either of these two options is used, a drop down menu appears listing a variety of travel actions.

3. Click on either the **Request for TDY** or **MILPCS Travel Authorization** option. The **Select Traveler** screen appears.



4. The **Select Traveler** screen displays a listing of the Travelers the Proxy may perform services for. Select a Traveler by **pointing** and **clicking** on the desired **name**.
5. After selecting the Traveler, **click** the **Create TDY or MILPCS Travel Auth for Selected Traveler** button. The **TDY or MILPCS Travel Request** screen appears.
6. Enter the required information in each of the applicable sections to create the request for authorization. Refer to the **links** listed under the **“See Also”** heading below for additional instructions.

See Also

- [Travel Authorizations - Itinerary](#)
- [Travel Authorizations - Reimbursable Expenses](#)
- [TDY Travel Authorization - Top Section](#)
- [MILPCS Travel Authorization - Top Section](#)
- [MILPCS Travel Authorization - Dependents](#)
- [Canceling Travel Authorizations](#)
- [Saving Travel Authorizations](#)
- [Printing Travel Authorizations](#)
- [Viewing Travel Authorizations](#)

Modifying Travel Authorizations

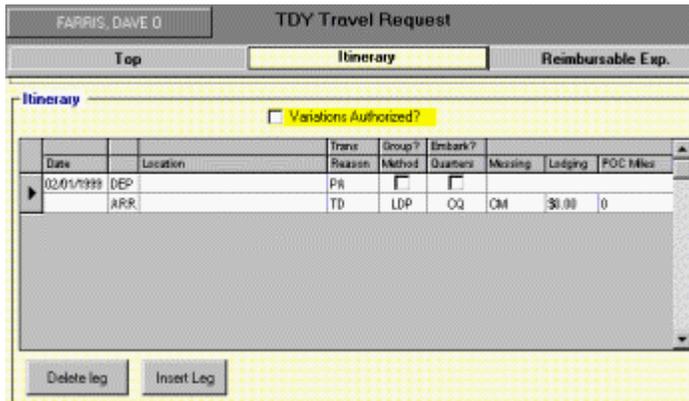
Deleting Travel Authorizations

Travel Authorizations - Itinerary

The **Itinerary** section is used to record the anticipated details regarding the trip.

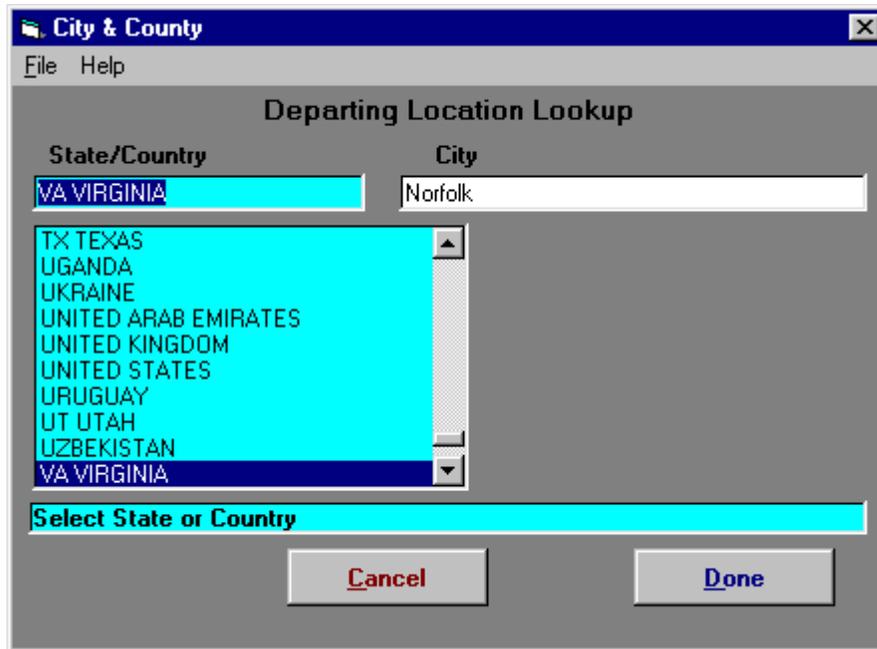
Completing the Itinerary section

1. Click the **Itinerary** button at the top of the **Travel Request** screen or the **down** arrow on the **slide bar** at the right side of the screen to access the Itinerary section.



Date	Location	Trans Reason	Group?	Embark?	Missing	Lodging	FOC Miles
02/01/1999	DEP	PR	<input type="checkbox"/>	<input type="checkbox"/>			
	ARR	TD	LDP	OQ	CM	\$0.00	0

2. Complete the itinerary by entering the following information:
 - **Variations Authorized** - Click on this item if the traveler should be allowed to **deviate** from the ordered itinerary. Click on this item **again** to **de-select**, if necessary.
 - **Depart Date** - The departure **date** on the first line of the itinerary automatically defaults from the **beginning date** entered at the **Period Covered** field in the **Top** section. Press *Enter* to continue or type a different date, if necessary.
 - **Depart Location** - At this field, the **Location Lookup** screen automatically appears.



At the **State/Country** field, type the first letter of the state or country then **click** the *Up/Down* arrows until the desired name is displayed. **Click** on the **name** to select.

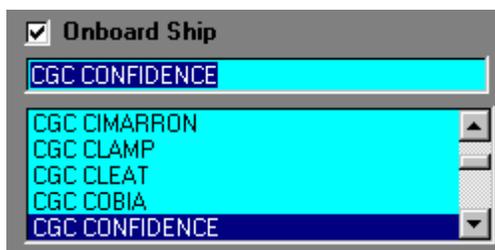
At the **City** field, type the first two letters of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.

- **Transportation** - At this field, a drop down listing of various transportation modes appears. **Click** the *Up/Down* arrows until the desired mode is displayed. **Click** on the correct **mode** to select.
- **Group?** - When **Group Travel Rules** has been activated in the **Top Section**, and the transportation mode is **PP, CP, CV, GP, GV, TP, TV, AF, CS**, the user must specify whether Group Travel rules apply. If Group Travel rules apply to the leg, **click** this box.

Note: When **Group Travel** rules are selected, the computation program will not calculate any **per diem** for the Group Travel leg.

- **Arrive Date** - The **date** at the previous **Departure Date** field **defaults** to the Arrival Date field. Press *Enter* to accept this date or type a new date if necessary.
- **Arrive Location** - Use the **same method** explained at the **Depart Location** field to complete the Arrive Location field. This should be the location where the traveler will stop to perform **official duty**.

Note: At the **Arrival Location Lookup** screen, **click** the **Onboard Ship** box if the location the traveler is arriving at is a Government Vessel.



A drop down listing of US Coast Guard **ship names** appears. Begin typing the name of the ship or **click** the *Up/Down* **arrows** until the desired ship name is displayed, then **click** on the correct ship's name to make a selection.

- **Reason for Stop** - At this field, a drop down listing of various **reasons** for stopping appears. The **default** value for this field is **TD - Temporary Duty**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired reason is displayed. **Click** on the correct reason to select.
- **Method of Reimbursement** - At this field, a drop down listing of various per diem computation **methods** appears. The **default** value for this field is **LDP - Lodgings Plus**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired method is displayed. **Click** on the correct method to select.
- **Quarters** - At this field, a drop down listing of various lodging types appears. The **default** value for this field is **CQ - Commercial Lodging**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired type is displayed. **Click** on the correct type to select.
- **Messing** - At this field, a drop down listing of various meal types appears. The **default** value for this field is **CM - Commercial Meals**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired type is displayed. **Click** on the correct type to select.
- **Lodging Cost** - At this field, enter the anticipated daily lodging cost for the location where the traveler will remain overnight.
- **POC Miles** - At this field, enter the official distance for the ordered travel, if a privately owned vehicle was used.

Tip: Use the procedures previously explained to complete the return travel leg or additional travel legs for the itinerary.

3. When finished with the itinerary, complete the **Reimbursable Expenses** section, if necessary, or **save** the authorization and release it to the **Authorizing Official** for **approval**.

See Also

[Entering Dates](#)

[Deleting Itinerary Legs](#)

[Inserting Itinerary Legs](#)

[Travel Authorizations - Reimbursable Expenses](#)

[Printing Travel Authorizations](#)

[Canceling Travel Authorizations](#)

[Releasing Travel Authorizations](#)

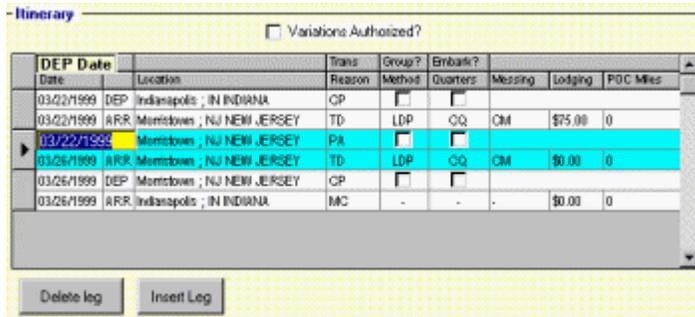
[Saving Travel Authorizations](#)

Inserting Itinerary Legs

When completing the itinerary section of a **Request for Travel Authorization** or **Settlement**, it may be necessary to insert an additional leg rather than re-entering the entire itinerary.

Complete the following steps to insert an itinerary leg:

1. **Point** and **click** in either the **arrive** or **depart** date fields where the new itinerary should be inserted.
2. **Click** on the **Insert Leg** button. UTS will insert a **new** leg at the selected location.



The screenshot shows a table titled "Itinerary" with a checkbox for "Variations Authorized?". The table has columns for DEP Date, Date, Location, Trans Reason, Method, Group?, Embark?, Quarters, Messing, Lodging, and POC Miles. A new leg is highlighted in yellow, showing a departure date of 03/22/1999 from Morristown, NJ NEW JERSEY via PA. Below the table are buttons for "Delete leg" and "Insert Leg".

DEP Date	Date	Location	Trans Reason	Method	Group?	Embark?	Quarters	Messing	Lodging	POC Miles
03/22/1999	DEP	Indianapolis ; IN INDIANA	CP							
03/22/1999	ARR	Morristown ; NJ NEW JERSEY	TD	LDP		CO	CM	\$75.00	0	
03/22/1999	ARR	Morristown ; NJ NEW JERSEY	PA							
03/26/1999	ARR	Morristown ; NJ NEW JERSEY	TD	LDP		CO	CM	\$0.00	0	
03/26/1999	DEP	Morristown ; NJ NEW JERSEY	CP							
03/26/1999	ARR	Indianapolis ; IN INDIANA	MC	-	-	-		\$0.00	0	

Note: After the new leg is inserted, it may be necessary to change the arrive/depart **dates** or the arrive/depart **locations**.

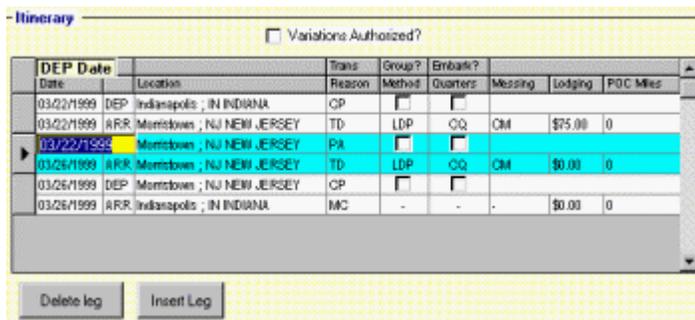
3. Make any necessary changes to the newly inserted itinerary leg.

Deleting Itinerary Legs

When completing the itinerary section of a **Request for Travel Authorization** or **Settlement**, it may be easier to delete a travel leg rather than re-entering the entire itinerary. This action may be necessary when a travel leg was entered unnecessarily or erroneously.

Complete the following steps to delete an itinerary leg:

1. **Point** and **click** in either the **arrive** or **depart** date fields of the leg that should be deleted.



The screenshot shows the same "Itinerary" table as above. The row for the departure on 03/22/1999 from Morristown, NJ NEW JERSEY via PA is highlighted in yellow, indicating it is selected for deletion. The "Delete leg" button is visible at the bottom.

DEP Date	Date	Location	Trans Reason	Method	Group?	Embark?	Quarters	Messing	Lodging	POC Miles
03/22/1999	DEP	Indianapolis ; IN INDIANA	CP							
03/22/1999	ARR	Morristown ; NJ NEW JERSEY	TD	LDP		CO	CM	\$75.00	0	
03/22/1999	ARR	Morristown ; NJ NEW JERSEY	PA							
03/26/1999	ARR	Morristown ; NJ NEW JERSEY	TD	LDP		CO	CM	\$0.00	0	
03/26/1999	DEP	Morristown ; NJ NEW JERSEY	CP							
03/26/1999	ARR	Indianapolis ; IN INDIANA	MC	-	-	-		\$0.00	0	

2. **Click** on the **Delete Leg** button. UTS will delete the selected itinerary leg.

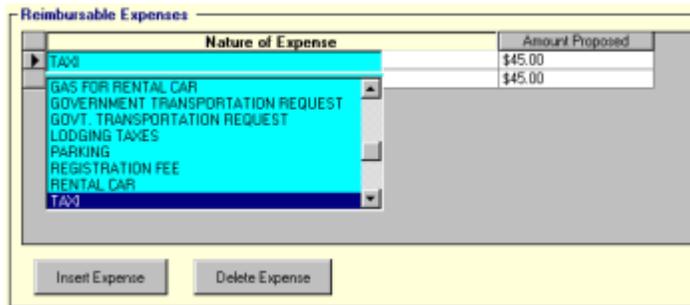
Note: An itinerary leg consists of a **depart** and **arrive** line. **Both** will be deleted.

Travel Authorizations - Reimbursable Expenses

The **Reimbursable Expenses** section is used to record the anticipated expenses the traveler will incur that are not associated with per diem or POC mileage.

Completing the Reimbursable Expenses section:

1. Click the **Reimbursable Exp** button at the top of the **Travel Request** screen or the *down arrow* on the **slide bar** at the right side of the screen to access the Reimbursable Expenses section.



Nature of Expense	Amount Proposed
TAXI	\$45.00
GAS FOR RENTAL CAR	\$45.00

Buttons: Insert Expense, Delete Expense

2. Complete this section by entering the following information:
 - **Nature of Expense** - At this field, a drop down listing of various expense items appears. **Click** the *Up/Down* arrows until the desired expense item is displayed. If the user types the first letter of the description, UTS scrolls the listing until locating the first item beginning with this letter. The user may then use the *Up/Down* arrows to display the exact item. Once the correct item is displayed, **click** on this item to select.
 - **Amount Proposed**- At this field, enter the expected amount of the expense.
3. When finished entering the anticipated reimbursable expenses, take the required action to **save** the authorization and **forward** it to the **Authorizing Official** for **approval**.

See Also

[Inserting Expense](#)

[Deleting Expense](#)

[Printing Travel Authorizations](#)

[Canceling Travel Authorizations](#)

[Releasing Travel Authorizations](#)

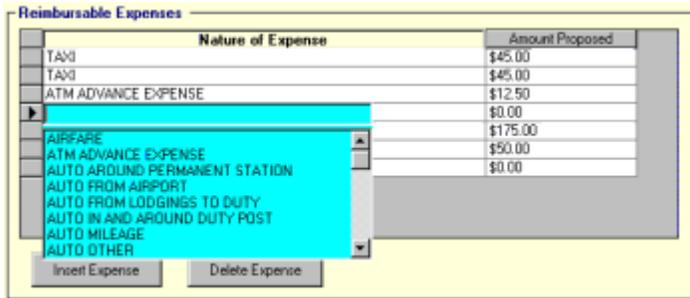
[Saving Travel Authorizations](#)

Inserting Expense

When completing the **Reimbursable Expenses** section of a **Request for Travel Authorization or Settlement**, it may be necessary to insert an additional expense item before one that was already entered.

Complete the following steps to insert an Expense:

1. **Point** and **click** in the field where the new expense should be inserted.
2. **Click** on the **Insert Expense** button. UTS will insert a **new** line at the selected location in the expenses listing.
3. **Enter** the required expense.



The screenshot shows the 'Reimbursable Expenses' form with a table of existing expenses and a dropdown menu open. The table has two columns: 'Nature of Expense' and 'Amount Proposed'. The dropdown menu lists various expense categories, with 'AIRFARE' selected.

Nature of Expense	Amount Proposed
TAXI	\$45.00
TAXI	\$45.00
ATM ADVANCE EXPENSE	\$12.50
	\$0.00
AIRFARE	\$175.00
ATM ADVANCE EXPENSE	\$50.00
AUTO AROUND PERMANENT STATION	\$0.00
AUTO FROM AIRPORT	
AUTO FROM LODGINGS TO DUTY	
AUTO IN AND AROUND DUTY POST	
AUTO MILEAGE	
AUTO OTHER	

Buttons: Insert Expense, Delete Expense

See Also

[Entering Reimbursable Expenses](#)

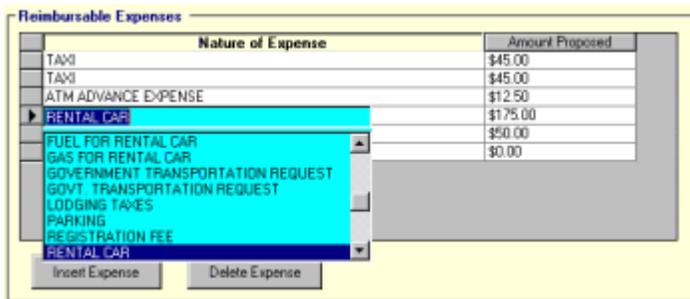
[Deleting Expense](#)

Deleting Expense

When completing the **Reimbursable Expenses** section of a **Request for Travel Authorization or Settlement**, it may be necessary to delete an expense that was previously entered.

Complete the following steps to delete an Expense:

1. **Point** and **click** in the field for the expense to be deleted.
2. **Click** on the **Delete Expense** button. UTS will delete the entire line for the field selected.



The screenshot shows the 'Reimbursable Expenses' form with a table of existing expenses and a dropdown menu open. The table has two columns: 'Nature of Expense' and 'Amount Proposed'. The dropdown menu lists various expense categories, with 'RENTAL CAR' selected.

Nature of Expense	Amount Proposed
TAXI	\$45.00
TAXI	\$45.00
ATM ADVANCE EXPENSE	\$12.50
RENTAL CAR	\$175.00
	\$50.00
	\$0.00
FUEL FOR RENTAL CAR	
GAS FOR RENTAL CAR	
GOVERNMENT TRANSPORTATION REQUEST	
GOVT. TRANSPORTATION REQUEST	
LODGING TAXES	
PARKING	
REGISTRATION FEE	
RENTAL CAR	

Buttons: Insert Expense, Delete Expense

See Also

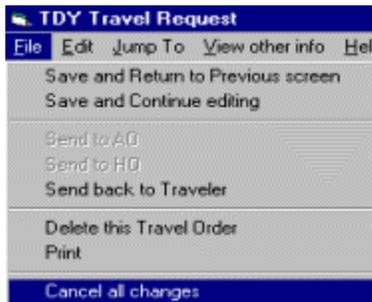
[Entering Reimbursable Expenses](#)

[Inserting Expense](#)

Canceling Travel Authorizations

There are two ways to **cancel** a Travel Authorization that has not been saved.:

1. **Click** the **Cancel** button at the bottom of the **Travel Request** screen.
2. **Click** on the **File** menu at the top of the **Travel Request** screen, then **click** on the **Cancel all changes** option.



After clicking on cancel, by using either method, a pop-up appears asking if you wish to cancel the screen. Click **Yes** if you wish to cancel without saving any of the input.

Note: If you wish to get rid of a Travel Authorization that has previously been saved, it must be deleted.

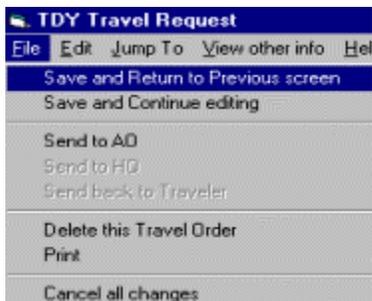
See Also

[Deleting a Travel Authorization](#)

Saving Travel Authorizations

There are two ways to **save** a Travel Authorization:

1. **Click** the **Save** button at the bottom of the **Travel Request** screen.
2. **Click** on the **File** menu at the top of the **Travel Request** screen, then **click** one of the following options:



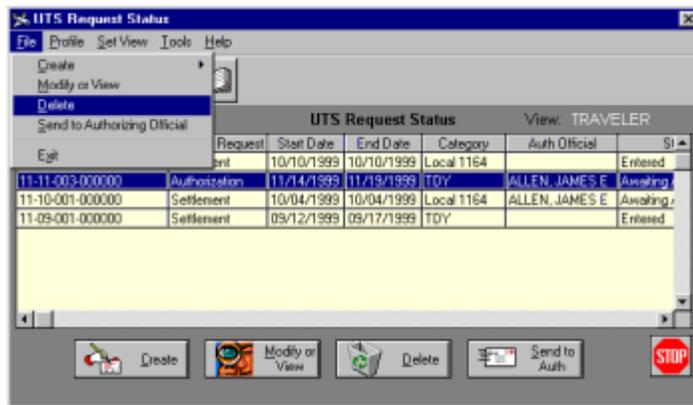
- **Save and Return to Previous Screen** - Use this option if you have finished creating the authorization and wish to exit UTS or perform another task.
- **Save and Continue editing** - Use this option if you are not finished creating the authorization, but would like to save what is completed so far.

Deleting Travel Authorizations

A Traveler or Proxy may delete Travel Authorizations that have not been released to an AO.

Delete a Travel Authorization in the Traveler or Proxy View:

1. Login to UTS in the **Traveler** or **Proxy** mode, or **change the view** if necessary.

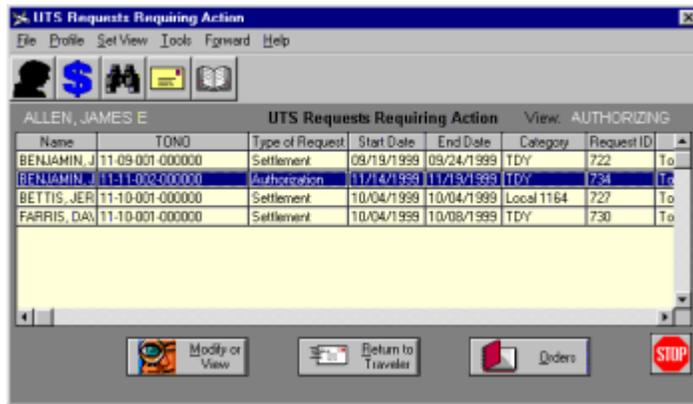


2. At the **UTS Request Status** screen, select the Travel Authorization you wish to delete by **pointing** and **clicking** on the desired authorization displayed in the Claims List.
3. After selecting an authorization, use one the following methods to delete the authorization:
 - **Method 1:** - Click the **Delete** button at the bottom of the **UTS Request Status** screen and then click **Yes** at the **Are You Sure** pop-up.
 - **Method 2:** - Click the **File** menu and select the **Delete** option from the drop down menu. Click **Yes** at the **Are You Sure** pop-up.
 - **Method 3:** - Click the **Modify or View** button at the bottom of the **UTS Request Status** screen to access the **Travel Request** screen. At this screen, **click** the **Delete Travel Request** button. Click **Yes** at the **Are You Sure** pop-up.

Note: The **Proxy** may delete his/her own authorization or one created by the Proxy on behalf of another individual.

Delete a Travel Authorization in the Authorizing Official View:

1. Login to UTS in the **Authorizing Official** mode or **change the view** to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, select the Travel Authorization you wish to delete by **pointing** and **clicking** on the desired authorization displayed in the Claims List.



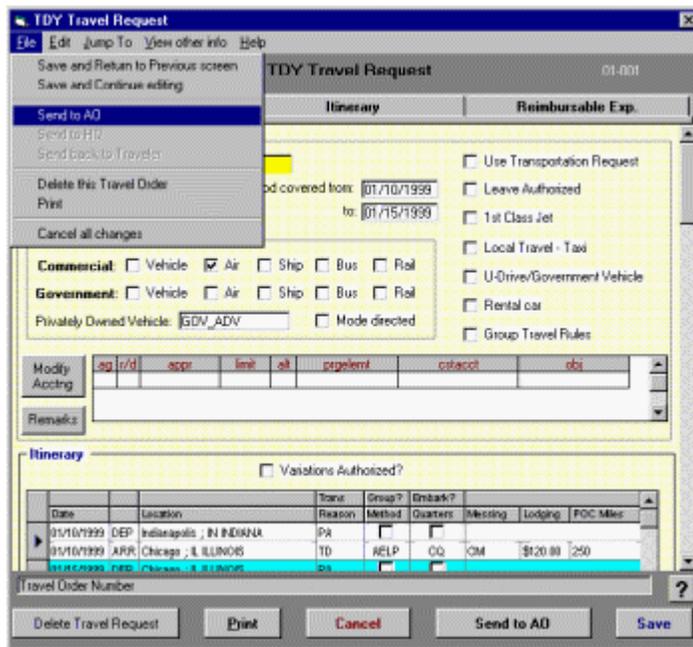
3. After selecting an authorization, **click the Modify or View** button.
4. At the **TDY or MILPCS Travel Request** screen, **click the Delete Travel Request** button.
5. A pop-up will appear asking if you wish to delete this request. **Click on Yes**.

Releasing Travel Authorizations

There are several ways to release a travel authorization for approval. In addition, this process can be performed by either the **Traveler** or the **Signature Proxy** designated by the Traveler.

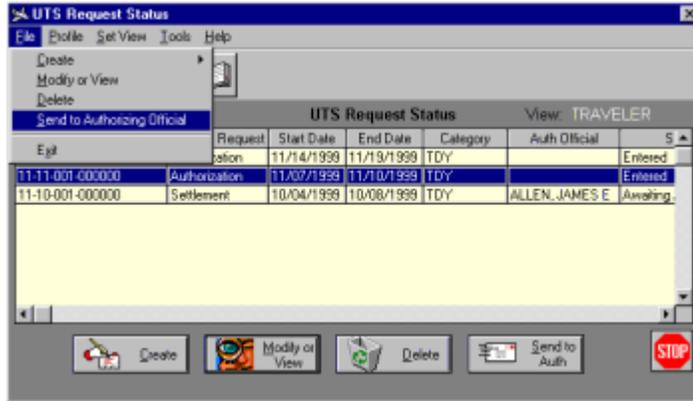
 **Use one of the following methods to release a Travel Authorization:**

- **Method 1:** - Click the **Send to AO** button at the bottom of the **Travel Request** screen.

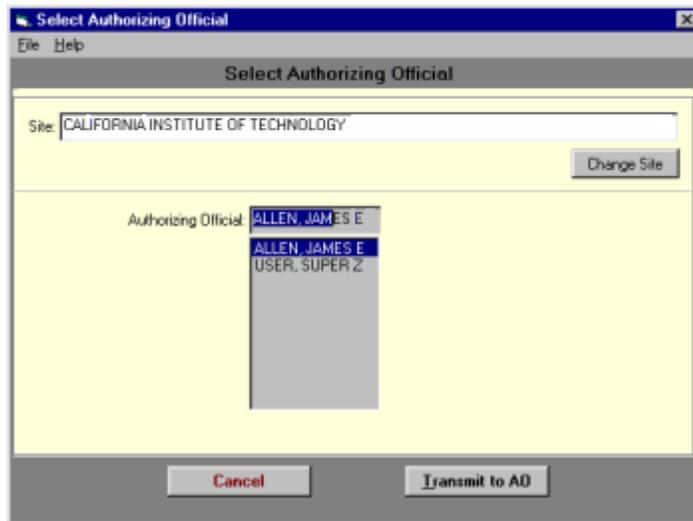


- **Method 2:** - Click on the **File** menu at the top of the **Travel Request** screen, then **click on the Send to AO** option.

- **Method 3:** - **Point** and **click** on the desired authorization listed in the Claims List on the **UTS Request Status** screen, then **click** the **Send to Auth** button.



- **Method 4:** - **Point** and **click** on the desired authorization listed in the Claims List on the **UTS Request Status** screen, **click** on the **File** menu, then **click** on the **Send to Authorizing Official** option.
1. After using one of the above methods to release a Travel Authorization, the **Select Authorizing Official** screen appears requiring the user to select an AO.

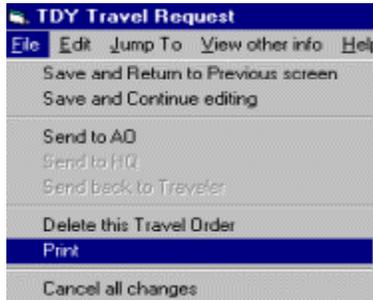


2. At the **Select Authorizing Official** screen, the name of the traveler's unit will be displayed at the **Site** field and the designated Authorizing Officials are listed below. If the correct AO is listed, **click** on the desired name, then **click** on the **Transmit to AO** button. The user can also **click** on the **Change Site** button to select a different unit and see a list of Authorizing Officials for the newly selected unit.
3. After selecting an AO, a pop-up appears requiring the entry of a **Confirmation** Password. This is the **Secondary Password** that was created when the user's **Personal Profile** was created.
4. After selecting an AO, **UTS forwards** the transaction to the **AO** and returns to the **UTS Request Status** screen.

Printing Travel Authorizations

There are two ways to **print** a Travel Authorization:

1. **Click** the **Print** button at the bottom of the **Travel Request** screen.
2. **Click** on the **File** menu at the top of the **Travel Request** screen, then **click** on the **Print** option.

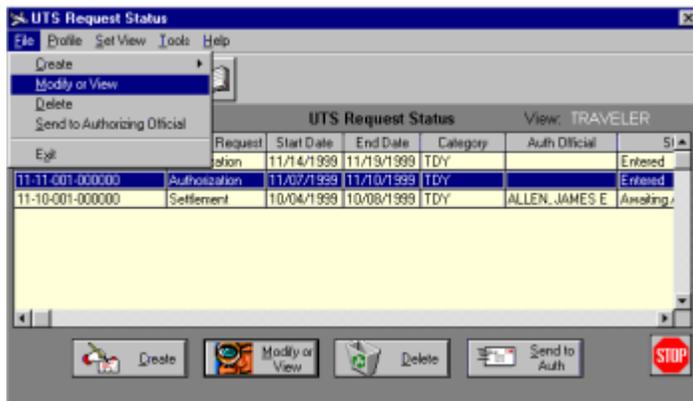


Viewing Travel Authorizations

Regardless of whether the user is logged into UTS as a **Traveler**, **Proxy**, or **Authorizing Official**, the process for viewing a Travel Authorization is essentially the same. The only difference is that the name of the initial screen is titled (**UTS Request Status**) for the **Traveler** and **Proxy**. For the **AO**, this screen is titled (**UTS Requests Requiring Action**).

 **Complete the following steps to View a Travel Authorization:**

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, there are two ways to view the **TDY** or **MILPCS Travel Request** screen:



- **Method 1:** Select the Travel Authorization you wish to view by **pointing** and **clicking** on the desired authorization displayed in the Claims List. After selecting an authorization, **click** the **File** menu and select the **Modify or View** option from the drop down menu.

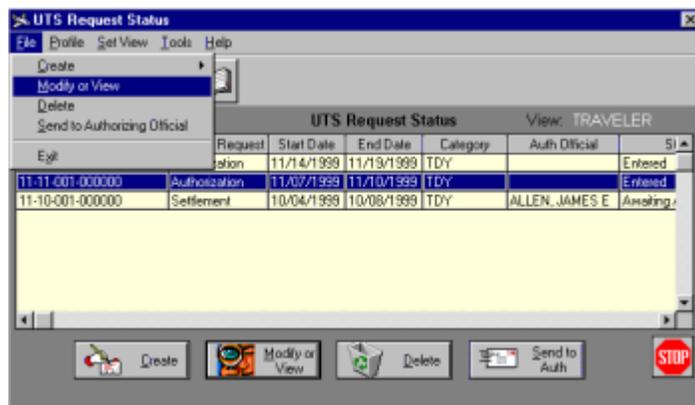
- **Method 2:** Select the Travel Authorization you wish to view by **pointing** and **clicking** on the desired authorization displayed in the Claims List. After selecting an authorization, **click** the **Modify or View** button at the bottom of the screen.
3. After using method **1** or **2** to select an authorization for viewing, the **TDY** or **MILPCS Travel Request** screen appears.
 4. When finished viewing the authorization, **click** the **Cancel** button or the **X** in the top right corner of the **Travel Request** screen, then **click** on **Yes** to **cancel** the screen and return to the **UTS Request Status** or **UTS Requests Requiring Action** screen.

Modifying Travel Authorizations

Regardless of whether the user is logged into UTS as a **Traveler, Proxy,** or **Authorizing Official,** the process for modifying a Travel Authorization is essentially the same. The only difference is that the name of the initial screen is titled (**UTS Request Status**) for the **Traveler** and **Proxy**. For the **AO**, this screen is titled (**UTS Requests Requiring Action**).

Complete the following steps to Modify a Travel Authorization:

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, there are two ways to access the **TDY** or **MILPCS Travel Request** screen.



- **Method 1:** Select the Travel Authorization you wish to modify by **pointing** and **clicking** on the desired authorization displayed in the Claims List. After selecting an authorization, **click** the **File** menu and select the **Modify or View** option from the drop down menu.
 - **Method 2:** Select the Travel Authorization you wish to modify by **pointing** and **clicking** on the desired authorization displayed in the Claims List. After selecting an authorization, **click** the **Modify or View** button at the bottom of the screen.
3. At the **TDY** or **MILPCS Travel Request** screen, press *Enter* or *Tab* to advance through the input fields, or **point** to the desired field and **click** the left mouse button.
 4. **Type** the required change or **select** a new option as needed.
 5. When finished modifying the authorization, **click** the **Save** button.

TDY Travel Authorizations

TDY Travel Authorization - Top Section

The Top section of the **TDY Travel Request** screen is used to determine the following:

- **Travel Order Number**
- **Type of Travel Order**
- **Purpose of the Trip**
- **Funding Organization**
- **Period Covered**
- **Authorized Mode of Transportation**
- **Special Authorizations**
- **Accounting Appropriation**
- **Special Remarks**

The screenshot shows the 'TDY Top Section' of a software interface. It has three tabs: 'Top', 'Itinerary', and 'Reimbursable Exp.'. The 'Top' tab is active. The form contains the following fields and options:

- TONO:** 0300
- Type of order:** NORMAL
- Purpose:** SITEVISIT
- Funds Used:** COASTGUARD
- Covered from:** 03/22/1999
- To:** 03/26/1999
- Mode of Travel:**
 - Commercial:** Vehicle Air Ship Bus Rail
 - Government:** Vehicle Air Ship Bus Rail
 - Privately Owned Vehicle:** NONE Mode directed
- Special Authorizations (checkboxes):**
 - Advance Authorized
 - Use Transportation Request
 - Leave Authorized
 - 1st Class Jet
 - Local Travel - Taxi
 - U-Drive/Government Vehicle
 - Rental car
 - Group Travel Rules

Completing the Top Section of the TDY Travel Request screen:

Tip: Press *Enter* or *Tab* to advance through the fields or point to the desired field and **click** the left mouse button.

- **TONO** - Type the travel order number for the request being created.
- **Type of Order** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired travel order type appears. **Click** on the desired **type** to populate the Type of Order field.
- **Purpose** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired purpose of the trip type appears. **Click** on the correct **purpose** to populate the Purpose field.
- **Funds Used** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the name of the organization funding the travel appears. **Click** on the correct **organization** to populate the Funds Used field.
- **Covered** - Enter the anticipated beginning and ending dates of the trip at the **From/To** fields.
- **Mode of Travel** - At this section, **point** to the requested mode of travel and **click** the left mouse button. A check mark appears indicating a selection. **Click** on the item **again to de-select**, if necessary. At the **Privately Owned Vehicle** field, a drop down listing appears. **Point** and **click** on the desired **type** to make a selection.

-
- **Special Authorizations** - On the right side of the **Top Section**, a list of special authorizations appear. **Point** and **click** on any of these applicable items. **Click** on the item **again** to **de-select**, if necessary.

See Also

Type of Orders

Entering Accounting

Entering Remarks

Travel Authorizations - Itinerary

Travel Authorizations - Reimbursable Expenses

MILPCS Travel Authorizations

MILPCS Travel Authorization - Top Section

The Top section of the **MILPCS Travel Request** screen is used to determine the following:

- **Travel Order Number**
- **Type of PCS Travel**
- **Departing Location**
- **Reporting Location**
- **Authorized Miles**
- **Funding Organization**
- **Period Covered**
- **Group Travel Rules**
- **Special Authorizations**

PCS Top Section

TONO: [REDACTED] Funds Used: COASTGUARD

PCS Type: STATOSTA Purpose: PCS

Depart location: [REDACTED] Detach Date: [REDACTED]

Report location: [REDACTED] Report Date: [REDACTED]

Auth Miles: 0 Group Travel Rules

Are These Authorized?

Proceed Time TLA DLA: NONE

TDY Enroute TLE # of cars authorized: 0

Ship POV Advance

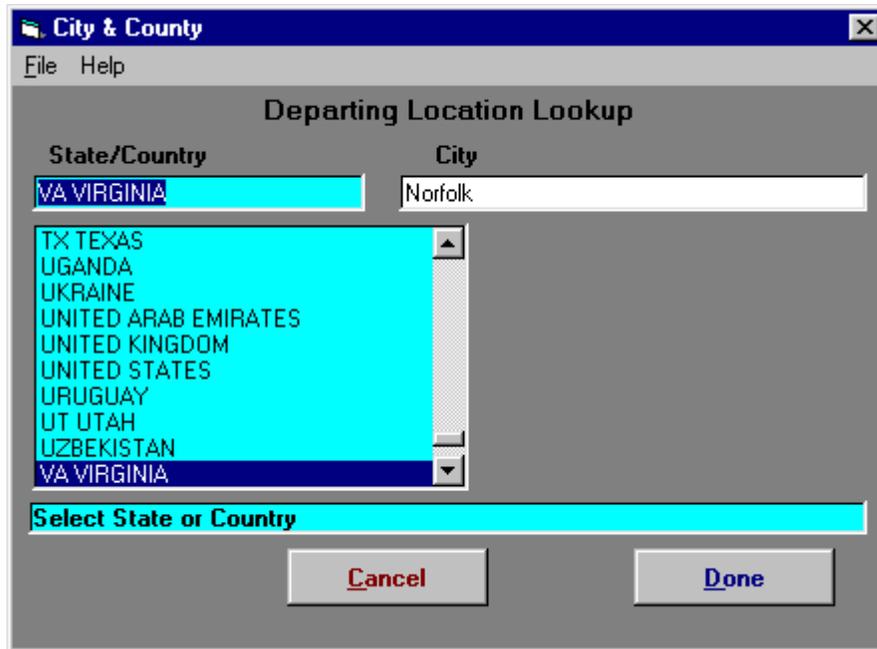
Modify	a/c	r/d	appr	limit	alt	alc	pgselent	cstacct	obj
Accounting	2					0			

Remarks: [REDACTED]

Completing the top section of the MILPCS Travel Request screen:

Tip: Press **Enter** or **Tab** to advance through the fields or **point** to the desired field and **click** the **left** mouse button.

- **TONO** - **Type** the travel order **number** for the request being created.
- **PCS Type** - At this field, a drop down listing appears. **Click** the **Up/Down arrows** on the **right** side of the listing until the desired type of PCS travel appears. **Click** on the desired **type** to populate the **PCS Type** field.
- **Depart Location** - Select the location of the **old** Permanent Duty Station, (**PDS**), or the place the travel will originate from. At this field, the **Location Lookup** screen automatically appears.



At the **State/Country** field, type the first letter of the state or country then **click** the *Up/Down* arrows until the desired name is displayed. **Click** on the **name** to select.

At the **City** field, type the first two letters of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.

- **Arrive Location** - Use the same process explained above for the Depart Location to select the location of the new PDS.
- **Funds Used** - UTS defaults to **Coast Guard** funds for MILPCS travel. No input is necessary. **Press Enter** to continue.
- **Purpose** - The default value at this field is PCS. No input required.
- **Detach Date** - Enter the anticipated date the traveler is required to **depart** from the old PDS.
- **Report Date** - Enter the anticipated date the traveler is required to **arrive** at the new PDS.
- **Auth Miles** - At this field, **enter the number of miles** authorized between the official points.
- **Group Travel Rules** - **Click** this option if Group Travel Rules should apply. If this option is checked, no per diem is calculated for the travel days.
- **Are These Authorized** - At this section, several entitlements are listed. **Point and click** on any of these applicable items to make a selection. **Click** on the item **again** to **de-select**, if necessary.
- **Modify Acctng** - An accounting appropriation must be added to the request before it can be approved by the AO. **Click** the **Modify Acctng** button to access the **Request Accounting** screen. Refer to the **Entering Accounting** link listed under the “**See Also** heading below for additional instructions.
- **Remarks** - Since the Request for Travel Authorization must be approved by an AO, it may be necessary to add remarks to explain certain circumstances. **Click** on the **Remarks** button to access the Remarks screen. Refer to the **Entering Remarks** link listed under the “**See Also** heading below for additional instructions.

See Also

[Entering Accounting](#)

[Entering Remarks](#)

[Travel Authorizations - Itinerary](#)

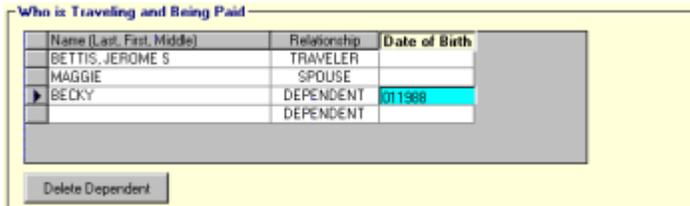
[Travel Authorizations - Reimbursable Expenses](#)

MILPCS Travel Authorization - Dependents

The Dependents section of the **MILPCS Travel Request** screen is used to identify the persons who are considered to be legal dependents of the member for travel allowance purposes.

Completing the Dependents Section

Tip: Press **Enter** or **Tab** to advance through the fields or **point** to the desired field and **click** the **left** mouse button.



The screenshot shows a window titled "Who is Traveling and Being Paid" containing a table with three columns: "Name (Last, First, Middle)", "Relationship", and "Date of Birth". The table lists three dependents: BETTIS, JEROME S (TRAVELER), MAGGIE (SPOUSE), and BECKY (DEPENDENT). The date of birth for BECKY is 011968. A "Delete Dependent" button is located below the table.

Name (Last, First, Middle)	Relationship	Date of Birth
BETTIS, JEROME S	TRAVELER	
MAGGIE	SPOUSE	
BECKY	DEPENDENT	011968
	DEPENDENT	

Delete Dependent

- **Name** - At this field, type the name of the dependent. Only the **first name** and **middle initial** are necessary.
- **Relationship** - At this field, the choices **Spouse** and **Dependent** are displayed. Press the *Up/Down* arrows to highlight the correct choice and press *Enter*, or **point** and **click** to select.
- **Date of Birth** - The per diem percentage used in calculating the entitlement for dependents is based on their age on the effective date of the travel order. At this field, enter the *date* of birth if the relationship is **Dependent**. A date of birth is not required for the **spouse**.

Travel Orders

About Travel Orders

A Travel Order is the basis for reimbursement of travel expenses and must be created by the **Traveler, Agency Proxy, or Signature Proxy**. It is used to **outline** the details of the trip and to **approve** the various items necessary for the accomplishment for the mission. In addition, it provides the **funding** information necessary for reporting the obligation and expenditures to the accounting system.

When a **Travel Authorization**, which was created using UTS, is **approved** by an AO, UTS automatically creates a **Travel Order record**. If the Travel Order was published using an order writer system, other than UTS, the **Travel Order record** must be **manually** created by the UTS user.

A request for advance or settlement cannot be processed unless there is a **Travel Order record** in the database.

See Also

[Creating TDY Travel Orders](#)

[Creating MILPCS Travel Orders](#)

[Canceling Travel Orders](#)

[Saving Travel Orders](#)

[Deleting Travel Orders](#)

[Viewing Travel Orders](#)

[Modifying Travel Orders](#)

Type of Orders

When creating **TDY** travel authorizations or travel orders, UTS requires the user to specify what **type of orders** are being created. The type of travel order specified has a direct impact on the way program functions, and the computation of the travel entitlement. Following, is a listing of the various types of TDY travel authorizations or orders that may be created and an explanation of the specific purpose:

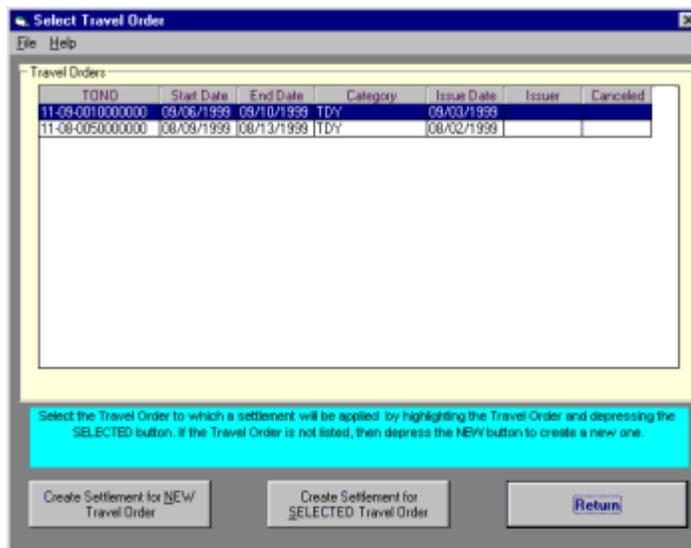
- **Normal** - Use this option if creating a travel authorization or travel order for a **regular TDY** trip that involves one round trip.
- **Blanket** - Use this option when **one** travel order will be used **repeatedly** for a specified period of time and an **unlimited** number of trips.

Selecting Travel Orders

When creating a request for **advance** or **settlement**, a previously approved travel order must first be **selected** or a new order must be created.

Selecting a Travel Order - Traveler View:

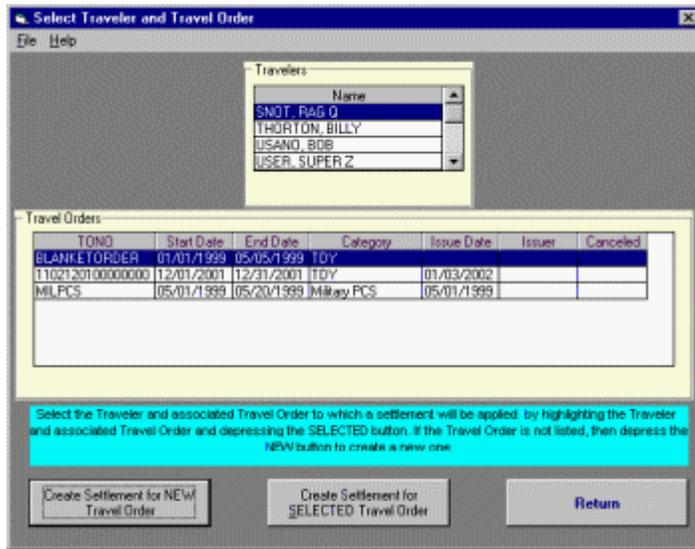
1. Login to UTS as a **Traveler** or **change the view** to Traveler, if necessary.
2. At the **UTS Request Status** screen, click the **Fill out** button, then select either the **Request for Advance** or **Request for 1351-2 Settlement** option. The **Select Travel Order** screen appears.



3. At this screen, all previously created travel orders for the traveler are listed. **Select** an order by **pointing** and **clicking** on one of the listed orders.

Selecting a Travel Order - Proxy View:

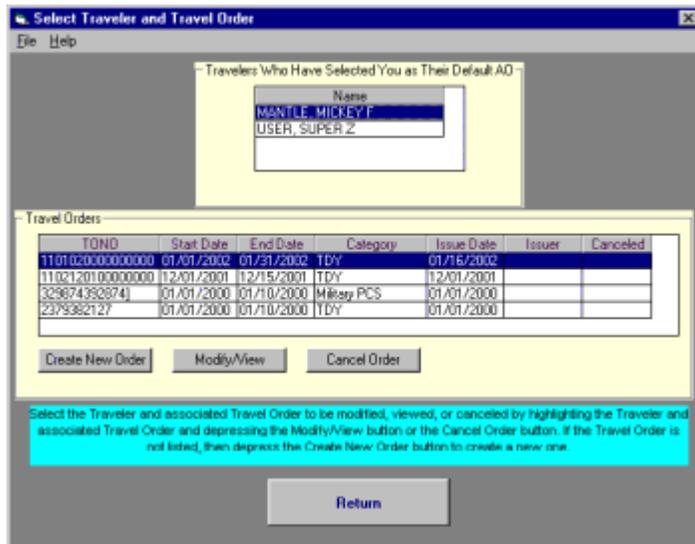
1. Login to UTS as a **Proxy** or **change the view** to Proxy, if necessary.
2. At the **UTS Request Status** screen, click the **Fill out** button, then select either the **Request for Advance** or **Request for 1351-2 Settlement** option. The **Select Traveler and Travel Order** screen appears.



- At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name**. The **Travel Orders** table lists any travel orders already existing for the selected Traveler. **Select** an order by **pointing** and **clicking** on one of the listed orders.

Selecting a Travel Order - Authorizing Official View:

- Login to UTS as an **Authorizing Official** or **change the view** to AO, if necessary.
- At the **UTS Requests Requiring Action** screen, **click** the **Orders** button. The **Select Traveler and Travel Order** screen appears.



- At this screen, the **Travelers** table lists all of the Travelers the AO can perform services for. **Point** and **click** on the desired Traveler's **name**. The **Travel Orders** table lists any travel orders already existing for the selected Traveler. **Select** an order by **pointing** and **clicking** on one of the listed orders.

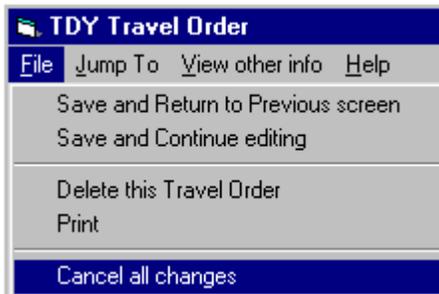
See Also

[Viewing Travel Orders](#)
[Modifying Travel Orders](#)
[Canceling Travel Orders](#)
[Deleting Travel Orders](#)

Canceling Travel Orders

There are two ways to **cancel** a Travel Order that has not been saved:

1. **Click** the **Cancel** button at the bottom of the **TDY** or **MILPCS Travel Order** screen.
2. **Click** on the **File** menu at the top of the **TDY** or **MILPCS Travel Order** screen, then **click** on the **Cancel all changes** option.



After clicking on cancel, by using either method, a pop-up appears asking if you wish to cancel the screen. **Click Yes** if you wish to cancel without saving any of the input.

Note: If you wish to get rid of a travel order that has previously been saved, it must be deleted.

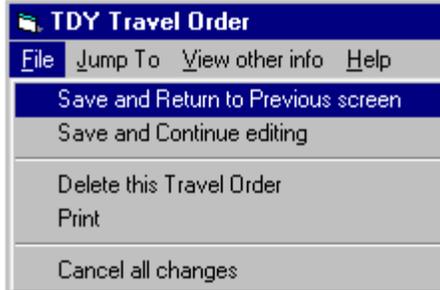
See Also

[Deleting Travel Orders](#)

Saving Travel Orders

There are two ways to **save** a Travel Order:

1. **Click** the **Save** button at the bottom of the **TDY** or **MILPCS Travel Order** screen.
2. **Click** on the **File** menu at the top of the **TDY** or **MILPCS Travel Order** screen, then **click** one of the following options:



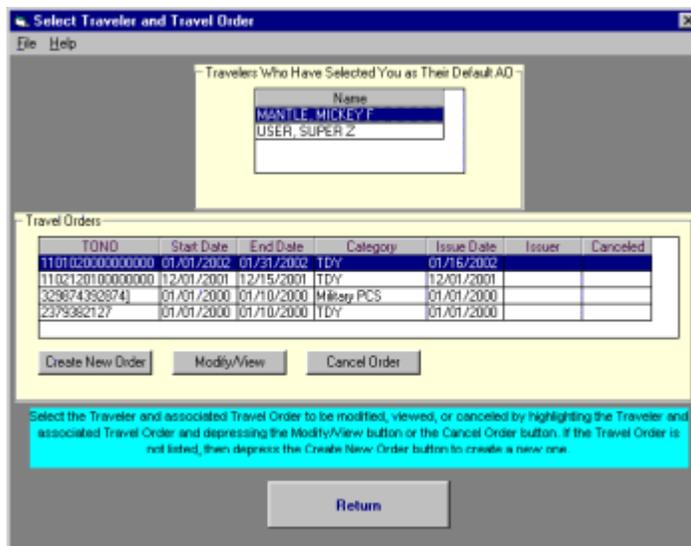
- **Save and Return to Previous Screen** - Use this option if you have finished creating the order and wish to exit UTS or perform another task.
- **Save and Continue editing** - Use this option if you are not finished creating the order, but would like to save what is completed so far.

Deleting Travel Orders

Note: Travel Order records may be deleted by Authorizing Officials only.

Complete the following steps to Delete a Travel Order

1. Login to UTS in the **Authorizing Official** mode or **change the view** to AO if necessary.
2. At the **UTS Request Requiring Action** screen, **click** the **Orders** button. The **Select Traveler and Travel Order** screen appears.



3. At this screen, the **Travelers** table lists all of the Travelers the **AO** can perform services for. **Click** the desired Traveler's **name**. The **Travel Orders** table lists any travel orders already existing for the selected Traveler. **Select** an order by **pointing** and **clicking** on one of the listed orders.
4. After selecting an order, **click** the **Modify/View** button.

- Depending on the type of order selected, either the **TDY** or **MILPCS Travel Order** screen appears next.

- At this screen, **click the Delete Travel Request button**, or **click on the File menu and select the Delete this Travel Order option**.
- A pop-up appears asking if you want to delete this travel order. **Click on the Yes button**.

Viewing Travel Orders

The **steps** required for viewing a Travel Order record **depend** on the **View Mode** being used.

Viewing Travel Orders - Traveler or Proxy View Mode:

Note: While using the **Traveler view**, an order may be viewed while creating a **Request for Advance** or **Settlement**, or when viewing the **Travel History**.

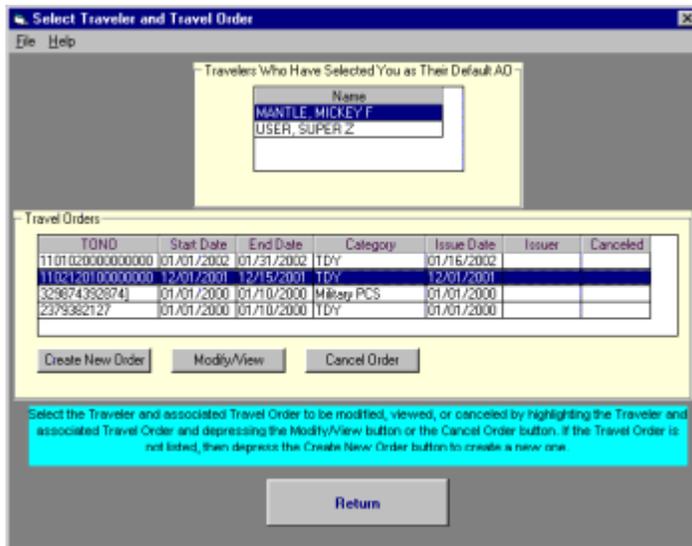
- Select the desired Travel Order to be viewed by following the procedures explained in the **“Selecting Travel Orders”** help topic.
- After selecting an order, **click the Create Settlement for Selected Travel Order button**. The **Request for Advance** or **Settlement** screen appears next.
- At the **Request for Advance** or **Settlement** screen, **click the View Other Info menu** at the top of the screen and then **click the Travel Order option**. The **Travel Order** screen appears.



4. When finished viewing the order, **click the Return button** or the **X** in the top right corner of the **TDY or MILPCS Travel Order** screen to return to the **Request for Advance or Settlement** screen.
5. At the **Request for Advance or Settlement** screen continue entering the request information, or **click the X** in the top right corner and **click on Yes** to return to the **UTS Request Status** screen.

Viewing Travel Orders - Authorizing Official View:

1. Login to UTS in the **Authorizing Official** mode or change the view to AO if necessary.
2. Select the desired Travel Order to be viewed by following the procedures explained in the [“Selecting Travel Orders”](#) help topic.



3. After selecting an order, **click the Modify/View button** at the bottom of the **Select Traveler and Travel Order** screen. The **TDY or MILPCS Travel Order** screen appears depending on the type of order selected.
4. When finished viewing the order, **click the Cancel button** or the **X** in the top right corner of the **TDY or MILPCS Travel Order** screen and **click on Yes** to cancel the screen.
5. At the **Select Traveler and Travel Order** screen, **click on the Return button** to return to the **UTS Requests Requiring Action** screen.

See Also

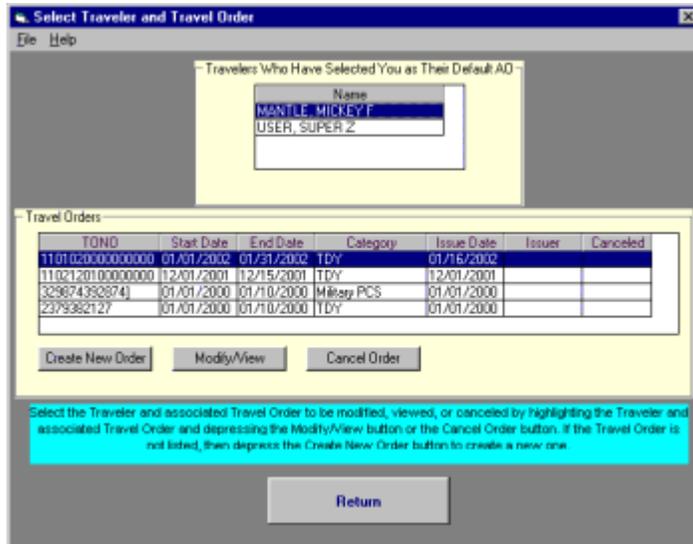
[Travel History](#)

Modifying Travel Orders

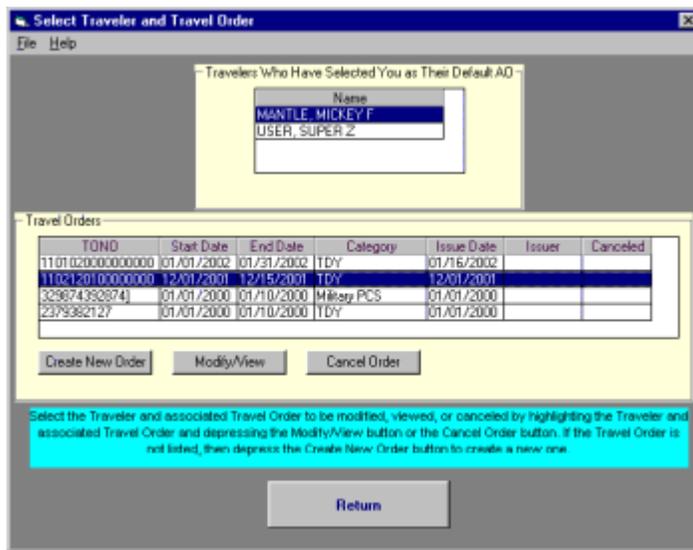
Note: Travel Orders may only be modified by an **Authorizing Official**.

Complete the following steps to Modify a Travel Order:

1. Login to UTS in the **Authorizing Official** mode or **change the view** to AO if necessary.
2. At the **UTS Requests Requiring Action** screen, **click the Orders** button and the **Select Traveler and Travel Order** screen appears.



3. At this screen, the **Travelers** table lists all of the Travelers the AO can perform services for. **Point** and **click** on the desired Traveler's **name**. The **Travel Orders** table lists any travel orders already existing for the selected Traveler. **Select** an order by **pointing** and **clicking** on one of the listed orders.



4. After selecting an order, **click** the **Modify/View** button.
5. At the **TDY** or **MILPCS Travel Order** screen, press *Enter* or *Tab* to advance through the input fields, or **point** to the desired field and **click** the left mouse button.
6. **Type** the required change or **select** a new option as needed.
7. When finished modifying the order, **click** the **Save** button.
8. At the **Select Traveler and Travel Order** screen, **click** on the **Return** button to return to the **UTS Requests Requiring Action** screen.

TDY Travel Orders

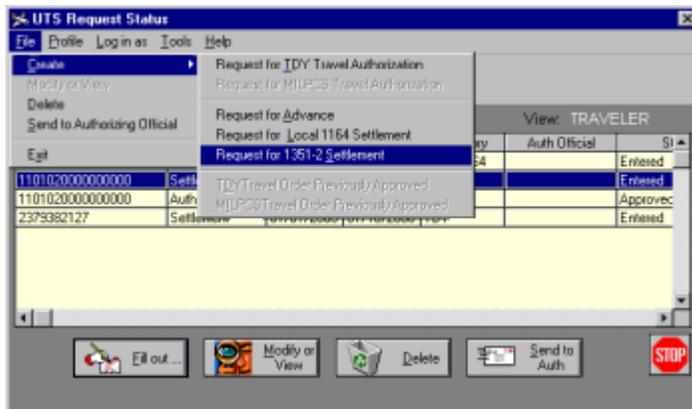
Creating TDY Travel Orders

A request for advance or settlement of TDY travel allowances cannot be processed without one of the following:

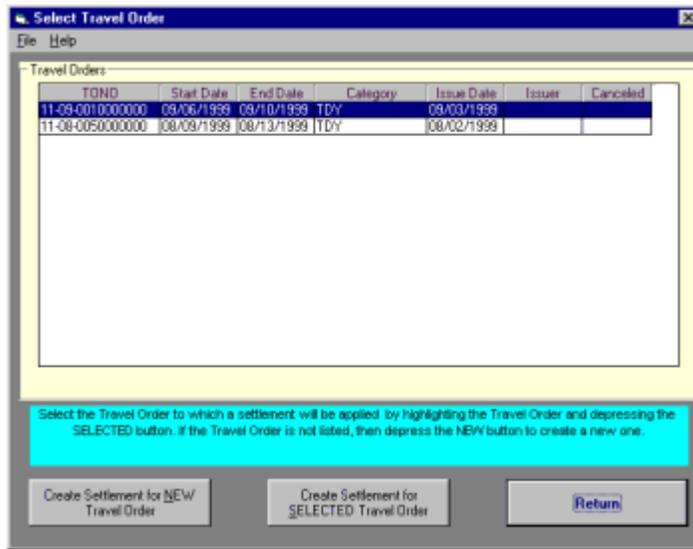
- An approved **TDY Travel Authorization** in the database
- A **TDY Travel Order** record created by either a **Traveler**, **Agency Proxy**, or **Signature Proxy**

Creating a TDY Travel Order - Traveler View:

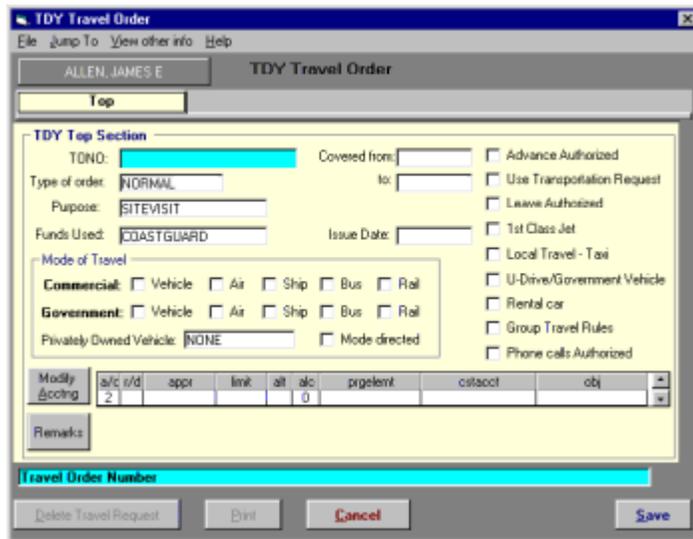
1. Login to UTS in the **Traveler** mode or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Fill out** button or **click** on the **File** menu and then **point** to the **Create** option. A drop down menu appears listing a variety of travel actions.



3. **Click** on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.



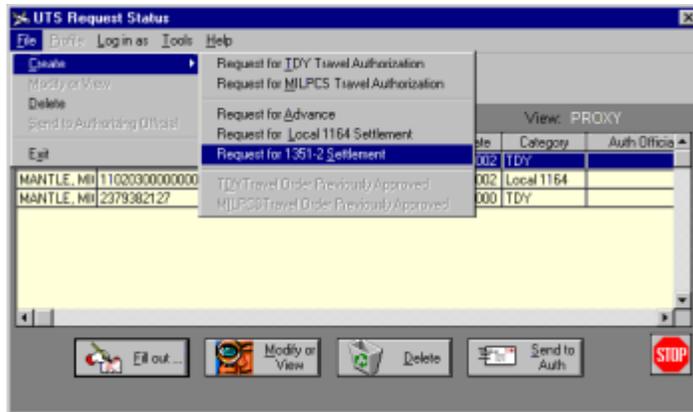
4. At this screen, **click** on the **Create Settlement for NEW Travel Order** button.
5. After clicking the **Create Settlement for NEW Travel Order** button, a pop-up appears requiring the user to select **TDY** or **Military PCS**. **Click** on **TDY**.
6. After clicking on **TDY**, the **TDY Travel Order** screen appears.



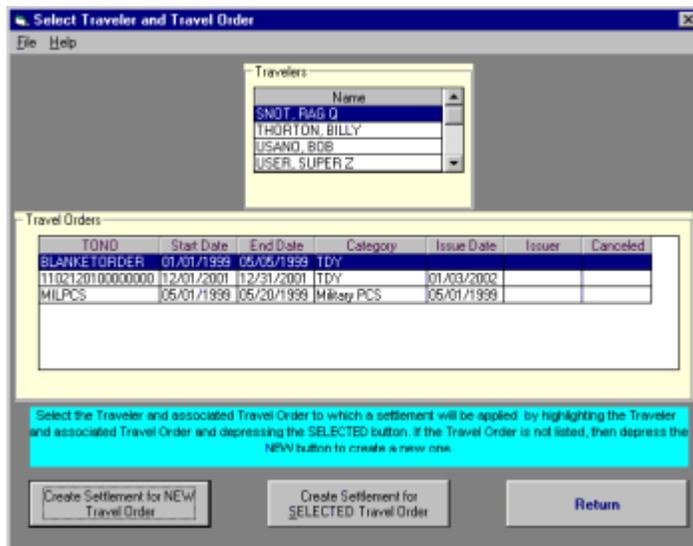
7. Refer to the various **links** listed below under the heading **“See Also”** for detailed instructions on completing the **TDY Travel Order** screen.

Creating a TDY Travel Order - Proxy View

1. Login to UTS in the **Proxy** mode or change the view to Proxy if necessary.
2. At the **UTS Request Status** screen, **click** on the **Fill out** button or on the **File** menu and then **point** to the **Create** option. A drop down menu appears listing a variety of travel actions.



3. Click on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.



4. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name**, then **click** the **Create Settlement for NEW Travel Order** button.
5. After clicking the **Create Settlement for NEW Travel Order** button, a pop-up appears requiring the user to select **TDY** or **Military PCS**. **Click** on **TDY**.
6. After clicking on **TDY**, the **TDY Travel Order** screen appears.
7. Refer to the various **links** listed below under the heading "**See Also** for detailed instructions on completing the **TDY Travel Order** screen.

See Also

[TDY Order - Top Section](#)

[Entering Accounting](#)

[Entering Remarks](#)

- Canceling Travel Orders
- Saving Travel Orders
- Deleting Travel Orders
- Viewing Travel Orders
- Modifying Travel Orders

TDY Order - Top Section

The Top Section of the **TDY Travel Order** screen is used to establish the following details:

- **Travel Order Number**
- **Type of Travel Order**
- **Purpose of the Trip**
- **Funding Organization**
- **Period Covered**
- **Issue Date of Order**
- **Authorized Mode of Transportation**
- **Special Authorizations**
- **Accounting Appropriation**
- **Special Remarks**

Modify	a/c	s/d	appr	limit	alt	alc	pgelem	cstaact	obj	Remarks
Acctg	2	8	9000	000	000	0	000000	000000	0000	

Completing the Top Section of the TDY Travel Order screen:

Tip: Press *Enter* or *Tab* to advance through the fields or point to the desired field and **click** the **left** mouse button.

- **TONO** - Type the **travel order number** for the order being created. If **Coast Guard** funds are being used, the travel order number must comply with the following requirements:
 1. The first two digits must be **(11)** if the order is a **Normal** TDY order.
 2. The first two digits must be **(13)** if the order is a **Blanket** TDY order.
 3. The order number must be **(16)** characters.
 4. The last three digits must be **(000)** zeros.

-
- **Type of Order** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired **travel order type** appears. **Click** on the correct **type** to populate the Type of Order field.
 - **Purpose** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the desired purpose of the trip type appears. **Click** on the correct **purpose** to populate the Purpose field.
 - **Funds Used** - At this field, a drop down listing appears. **Click** the *Up/Down* arrows on the right side of the listing until the name of the organization funding the travel appears. **Click** on the correct **organization** to populate the Funds Used field.
 - **Covered** - Enter the anticipated beginning and ending **dates** of the trip at the **From/To** fields.
 - **Issue Date** - At this field, enter the date that the travel order was issued in **MMDDYY** format.
 - **Mode of Travel** - At this section, **point** to the requested mode of travel and **click** the left mouse button. A check mark appears indicating a selection. **Click** on the item **again** to de-select, if necessary. At the **Privately Owned Vehicle** field, a drop down listing appears. **Point** and **click** on the desired **type** to make a selection.
 - **Special Authorizations** - On the right side of the Top Section, a list of special authorizations appear. **Point** and **click** on any of these applicable items. **Click** on the item **again** to de-select, if necessary.

See Also

[Entering Accounting](#)

[Entering Remarks](#)

[Canceling Travel Orders](#)

[Saving Travel Orders](#)

[Deleting Travel Orders](#)

[Viewing Travel Orders](#)

[Modifying Travel Orders](#)

MILPCS Travel Orders

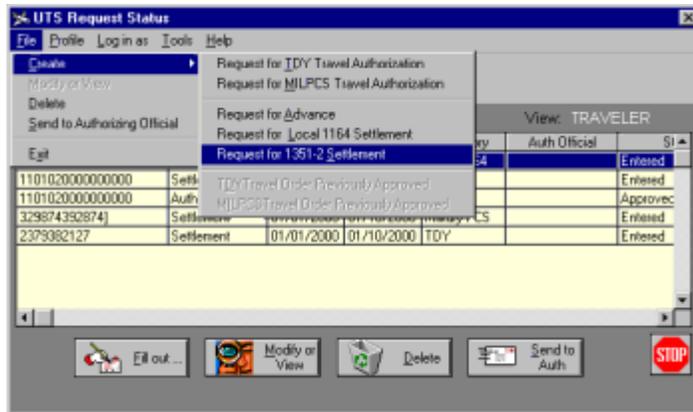
Creating MILPCS Travel Orders

A request for advance or settlement of Military PCS travel allowances cannot be processed without one of the following:

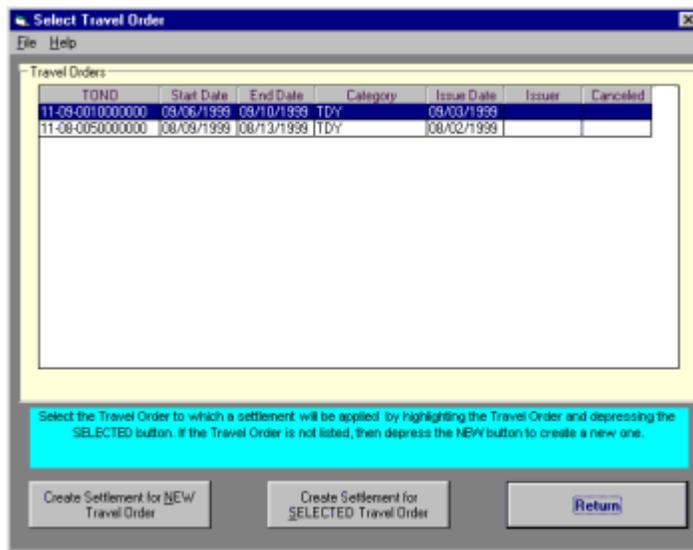
- An approved **MILPCS Travel Authorization** in the database
- A **MILPCS Travel Order** record created by either a **Traveler**, **Agency Proxy**, or **Signature Proxy**

Creating a MILPCS Travel Order - Traveler View:

1. Login to UTS in the **Traveler** mode or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Fill out** button or **click** on the **File** menu and then **point** to the **Create** option. A drop down menu appears listing a variety of travel actions.



3. Click on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.



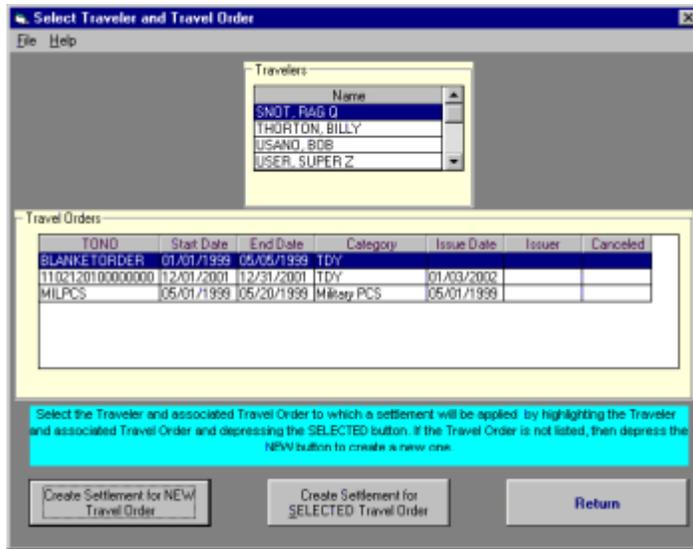
- At this screen, click on the **Create Settlement for NEW Travel Order** button.
- After clicking the **Create Settlement for NEW Travel Order** button, a pop-up appears requiring the user to select **TDY** or **Military PCS**. Click on **Military PCS**.
- After clicking on **Military PCS**, the **MILPCS Travel Order** screen appears.

7. Refer to the various **links** listed below under the heading “**See Also**” for detailed instructions on completing the **MILPCS Travel Order** screen.

Creating a MILPCS Travel Order - Proxy View:

1. Login to UTS in the **Proxy** mode or change the view to Proxy if necessary.
2. At the **UTS Request Status** screen, **click** on the **Fill out** button or **click** on the **File** menu and then **point** to the **Create** option. A drop down menu appears listing a variety of travel actions.

3. **Click** on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.



4. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name**, then **click** the **Create Settlement for NEW Travel Order** button.
5. After clicking the **Create Settlement for NEW Travel Order** button, a pop-up appears requiring the user to select **TDY** or **Military PCS**. **Click** on **Military PCS**.
6. After clicking on Military PCS, the **MILPCS Travel Order** screen appears.
7. Refer to the various **links** listed below under the heading "**See Also** for detailed instructions on completing the **MILPCS Travel Order** screen.

See Also

- [MILPCS Order - Top Section](#)
- [MILPCS Order - Are These Authorized](#)
- [MILPCS Order - Dependents](#)
- [Entering Accounting](#)
- [Entering Remarks](#)
- [Canceling Travel Orders](#)
- [Saving Travel Orders](#)
- [Deleting Travel Orders](#)
- [Viewing Travel Orders](#)
- [Modifying Travel Orders](#)

MILPCS Order - Top Section

The Top Section of the **MILPCS Travel Order** screen is used to establish the following details:

- **Travel Order Number**
- **Type of PCS Travel**
- **Locations of the Old and New PDS**
- **Agency Funding the Travel**
- **Purpose of the Travel**
- **Detach and Reporting Dates**
- **Issue Date of Order**
- **Authorized Miles**
- **Group Travel Rules**
- **Special Authorizations**
- **Accounting Appropriation**
- **Remarks**

PCS Top Section

TONO: 329874392874 Funds Used: COASTGUARD
PCS Type: STATOSTA Purpose: PCS
Depart location: Providence, RHODE ISLAND Detach Date: 01/01/2000
Report location: Hartford, CONNECTICUT Report Date: 01/10/2000
Auth Miles: 100 Group Travel Rules Issue Date: 01/01/2000

Are These Authorized?

Proceed Time TLA DLA: DEP
 TDY Enroute TLE # of cars authorized: 1
 Ship POV Advance

Modify	a/c	r/d	apr	limit	alt	alc	pgselnt	colacct	obj
Acctg	2					0			

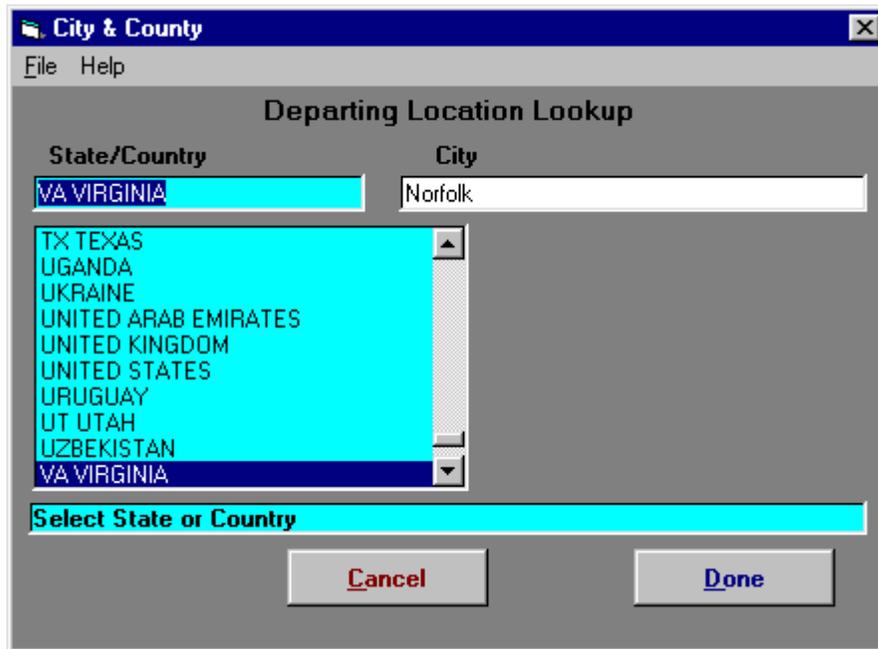
Remarks:

Completing the MILPCS Order - Top Section:

Tip: Press **Enter** or **Tab** to advance through the fields or **point** to the desired field and **click** the left mouse button.

- **TONO** - Type the **travel order number** for the order being created. If **Coast Guard** funds are being used, the travel order number must comply with the following requirements:
 1. The first two digits must be **(12)** if the order is a **PCS** order.
 2. The order number must be **(16)** characters.
 3. The last three digits must be **(000)** zeros.
- **PCS Type** - At this field, a drop down listing appears. **Click** the *Up/Down* **arrows** on the right side of the listing until the desired PCS type appears. **Click** on the desired **type** to populate the PCS Type field.

- **Depart Location** - At this field, enter the location of the **old** Permanent Duty Station (**PDS**). When the cursor is advanced to this field, the **Location Lookup** screen automatically appears.



At the **State/Country** field, type the first letter of the state or country then **click** the *Up/Down* arrows until the desired name is displayed. **Click** on the **name** to select.

At the **City** field, type the first two letters of the city name. This displays a listing of city names, beginning with those letters, for the previously selected state or country. **Click** on the desired city **name** to select.

- **Report Location** - At this field, enter the location of the **new** Permanent Duty Station (**PDS**). Use the same process explained at the Depart Location to select a State/Country and City name.
 - **Funds Used** - UTS defaults to **Coast Guard** funds for MILPCS travel. No input is necessary. **Press Enter** to continue.
 - **Purpose** - At this field, UTS defaults to **PCS** as the purpose. No input is required.
 - **Detach Date** - At this field, enter the **date** the traveler is expected to **depart** from the **old** PDS.
 - **Report Date** - At this field, enter the **date** the traveler is expected to **arrive** at the **new** PDS.
 - **Issue Date** - At this field, enter the date that the travel order was issued in **MMDDYY** format.
 - **Auth Miles** - At this field, **enter the number of miles** authorized between the official points.
 - **Group Travel Rules** - **Click** this option if Group Travel Rules should apply. If this option is checked, no per diem is calculated for the travel days.
4. Refer to the **links** listed below under the heading "**See Also**" for additional instructions on completing the **Are These Authorized**, **Accounting**, and **Remarks** sections.

See Also

[Are These Authorized](#)

[Entering Accounting](#)

[Entering Remarks](#)

[Dependents](#)

[Canceling Travel Orders](#)

[Saving Travel Orders](#)

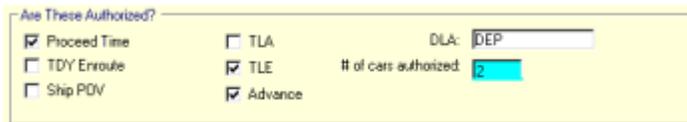
[Deleting Travel Orders](#)

[Viewing Travel Orders](#)

[Modifying Travel Orders](#)

MILPCS Order - Are These Authorized

The **Are These Authorized** section of the MILPCS Travel Order screen is used to select **additional allowances** that are applicable to the travel order.



Completing the Are These Authorized Section:

Tip: Press **Enter** or **Tab** to advance through the various fields. **Point** and **click** the left mouse button to **select** an item. **Click** on the item **again** to de-select, if necessary.

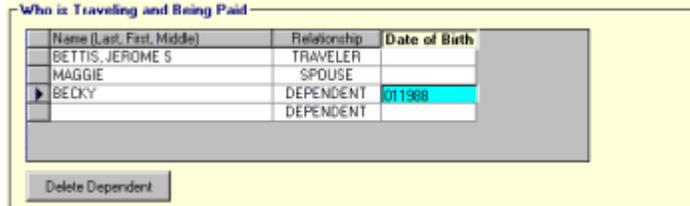
- **Proceed Time** - Proceed Time is essentially administrative time off, up to **four** days, to take care of personal affairs. Some branches of military service grant Proceed Time in conjunction with PCS travel. Selecting this option **impacts** the calculation of **Leave** days.
- **TDY Enroute** - Select this item if the traveler is authorized to perform TDY in conjunction with the PCS enroute travel. This selection will not impact the calculation, it is used for **historical** purposes only.
- **Ship POV** - Select this item if the traveler is authorized to ship a **Privately Owned Vehicle** in connection with the PCS.
- **TLA** - Select this item if the traveler is authorized to receive **Temporary Lodging Allowance** in connection with the PCS. The selection will not impact the calculation, it is used for **historical** purposes only. TLA is not calculated by IATS.
- **TLE** - Select this item if the traveler is authorized to receive **Temporary Lodging Expense** in connection with the PCS.
- **Advance** - Select this item if the traveler is authorized to receive an **advance** payment of the PCS travel allowances.
- **DLA** - At this field, a drop down listing of **Dislocation Allowance** types appears. **Click** on the desired **type** to populate the DLA field.
- **# Of Cars Authorized** - At this field, enter the **number** of POV's the traveler is authorized to relocate to the new PDS. This field must be populated in order for a mileage reimbursement to be calculated.

MILPCS Order - Dependents

The Dependents section of the MILPCS Travel Order screen is used to **identify** the persons who are considered to be **legal dependents** of the member for travel allowance purposes. To avoid having to modify the travel order later, this section should be completed regardless of whether the dependents have relocated yet. It is common for dependents to relocate after the member has already reported to the new PDS.

Completing the Dependents Section:

Tip: Press **Enter** or **Tab** to advance through the fields or **point** to the desired field and **click** the left mouse button.



Name (Last, First, Middle)	Relationship	Date of Birth
BETTIS, JEROME S	TRAVELER	
MAGGIE	SPOUSE	
BECKY	DEPENDENT	011988
	DEPENDENT	

Delete Dependent

- **Name** - At this field, type name of the dependent. Only the **first name** and **middle initial** is necessary.
- **Relationship** - At this field, the choices **Spouse** and **Dependent** are displayed. Press the *Up/Down* **arrows** to highlight the correct choice and press *Enter* or **point** and **click** to select.
- **Date of Birth** - The per diem percentage used in calculating the entitlement for dependents is based on their age on the effective date of the travel order. At this field, enter the **date** of birth if the relationship is **Dependent**. A date of birth is not required for the **spouse**.

Travel Advances

About Travel Advances

The UTS program gives you the capability to create a **Request for Advance** for both TDY and MILPCS travel using a pre-determined amount. The user must manually calculate the entitlement or use the amount requested by the traveler when creating a **Request for Advance** with UTS.

A **Request for Advance** cannot be processed unless there is an approved **Travel Authorization** or **Travel Order** record in the database.

See Also

[Creating Request for Advance](#)

[Entering Request for Advance](#)

[Deleting Request for Advance](#)

[Canceling Request for Advance](#)

[Releasing Request for Advance](#)

[Saving Request for Advance](#)

[Viewing Request for Advance](#)

[Modifying Request for Advance](#)

[Printing Request for Advance](#)

Creating Request for Advance

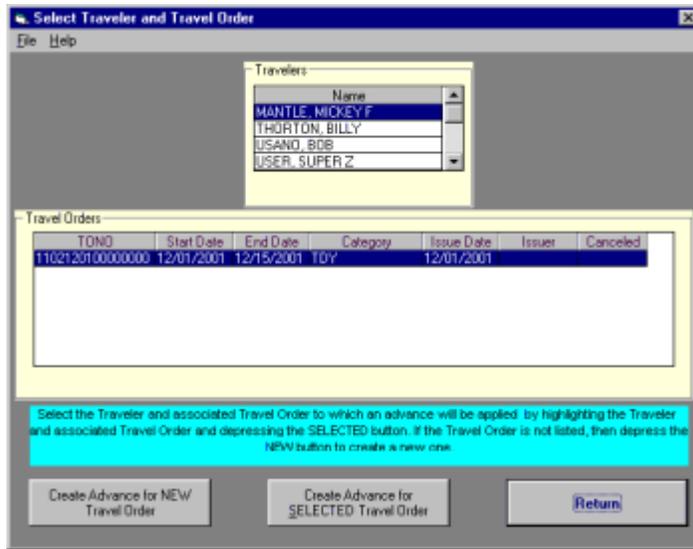
When there is an approved **Travel Authorization** or **Travel Order** record in the database, a **Request for Advance** may be created by either a **Traveler**, **Agency Proxy**, or a **Signature Proxy**.

The steps involved in creating an Advance Request depend on which of the following **View** modes is used:

- **Traveler**
- **Proxy**
- **Signature Proxy**

Creating Request for Advance - Traveler View:

1. Login to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Fill out** button or **click** on the **File** menu and then **point** to the **Create** option. A drop down menu appears listing a variety of travel actions.



4. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name**. The **Travel Orders** table lists any travel orders already existing for the selected Traveler.
5. At this screen, **point** and **click** on the correct order, if listed, and then **click** the **Create Advance for Selected Order** button. If the correct order is not displayed, **click** on the **Create Advance for New Travel Order** button.
6. After clicking the **Create Advance for Selected Order** button or creating a new order, the **Request for TDY or MILPCS Advance** screen appears.
7. Complete the [Request for Advance](#) screen. Refer to the **links** listed below under the heading "**See Also** for additional instructions.

See Also

- [Entering Request for Advance](#)
- [Deleting Request for Advance](#)
- [Canceling Request for Advance](#)
- [Releasing Request for Advance](#)
- [Saving Request for Advance](#)
- [Viewing Request for Advance](#)
- [Modifying Request for Advance](#)
- [Printing Request for Advance](#)

Entering Request for Advance

The **Request for Advance** screen is used to capture the specific details regarding the Advance.

Complete this screen by entering the following information:

1. **Amount** - Click in this field, and then **type** the **amount** to be advanced to the traveler.
2. **Method of Payment** - At this field, a listing of various payment methods appears. **Click** on the desired method to make a selection.
3. **Accounting** - If the accounting appropriations is not already present, **click** on the **Modify Acctng** button. This brings up the **Request Accounting** screen. Enter the correct appropriation into the appropriate fields.

4. **Accounting Remarks** - Notice the **Remarks** box appearing directly below the **Current Request Accounting Lines** table. This box is used to add remarks pertaining to the accounting appropriations for the current travel action. **Click** inside the text box and **type** the desired remarks. **Click** the **Validate Accounting** button when finished.
5. **Request Remarks** - Back at the **Request for Advance** screen, It may be necessary or beneficial to add **remarks** to the Advance Request. **Click** the **Remarks** button to access the **Advance Request Remarks** screen. **Type** the desired remarks and **click** the **Return** button when finished.

6. When finished entering the required information at the **Request Accounting** screen, **click** the **Save** button.
7. Release the Request for Advance to the **AO** for approval when ready. Refer to the link **“Releasing Request for Advance** listed below under the **“See Also”** heading.

See Also

- Entering Accounting
- Entering Remarks
- Deleting Request for Advance
- Canceling Request for Advance
- Releasing Request for Advance
- Saving Request for Advance
- Viewing Request for Advance
- Modifying Request for Advance
- Printing Request for Advance

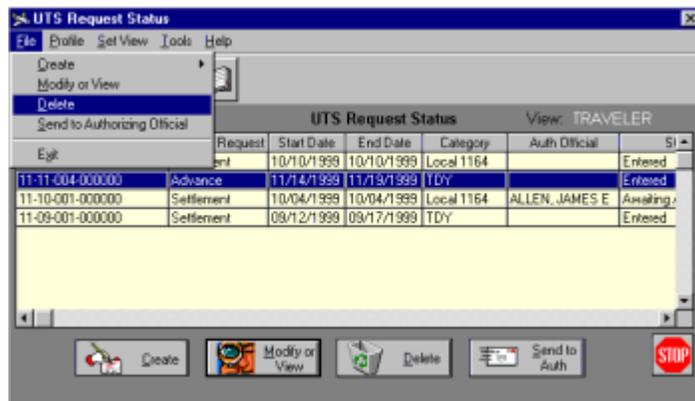
Deleting Request for Advance

A Request for Advance that has not been **released** to the AO may be deleted by the Traveler or the Proxy.

Note: The AO cannot delete a Request for Advance. If the request has already been forwarded to the AO, but should be deleted, the AO must **return** the request to the Traveler.

Deleting Request for Advance Traveler/Proxy view:

1. Login to UTS and change the view to Traveler or Proxy, if necessary.



2. At the **UTS Request Status** screen, select the Request for Advance you wish to delete by **pointing** and **clicking** on the desired item displayed in the Claims List.
3. After selecting a Request for Advance, use one the following methods:
 - **Method 1:** - Click the **Delete** button at the bottom of the screen and then **click** on **Yes** at the **Are You Sure** pop-up.

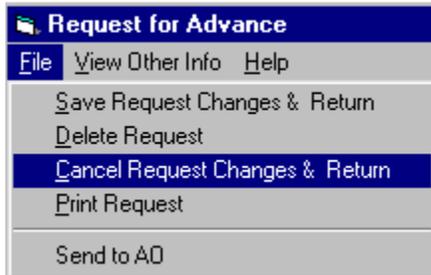
- **Method 2:** - Click the **File** menu, select the **Delete** option from the drop down menu, and **click** on **Yes** at the **Are You Sure** pop-up.
- **Method 3:** - Click the **Modify or View** button at the bottom of the screen to access the **Advance Request** screen. At this screen, **click** the **Delete Request** button then **click** on **Yes** at the **Deleting this Request** pop-up.
- **Method 4:** - Click the **Modify or View** button at the bottom of the screen to access the **Advance Request** screen. At this screen, **click** the **File** menu and then click on the **Delete Request** option. **Click** on **Yes** at the **Deleting this Request** pop-up to complete the process.

Tip: A Request for Advance created by a Proxy can only be deleted by the Traveler if the Traveler takes control of the request.

Canceling Request for Advance

If the initial input or current changes to a Request for Advance have not been saved, there are two ways to **cancel** a Request for Advance, or the changes being made:

1. **Click** the **Cancel** button at the bottom of the **Request for Advance** screen. A pop-up appears asking if you wish to cancel this screen. **Click** on **Yes**.
2. **Click** on the **File** menu at the top of the **Request for Advance** screen, then **click** on the **Cancel Request Changes & Return** option. A pop-up appears asking if you wish to cancel this screen. **Click** on **Yes**.

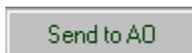


Releasing Request for Advance

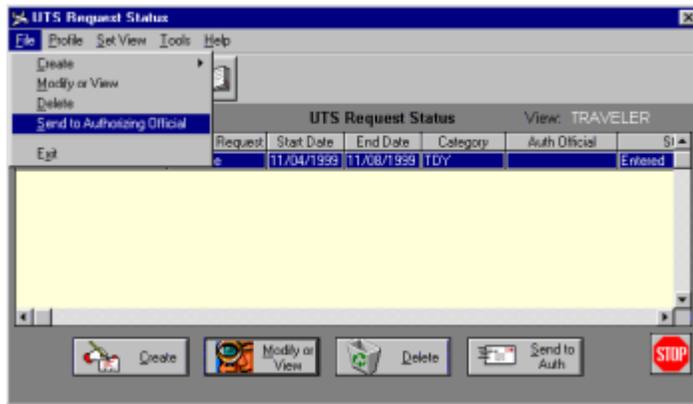
A Request for Advance can be released to the **AO** by either the **Traveler** or the **Signature Proxy** designated by the Traveler.

 **Use one of the following methods to release a Request for Advance:**

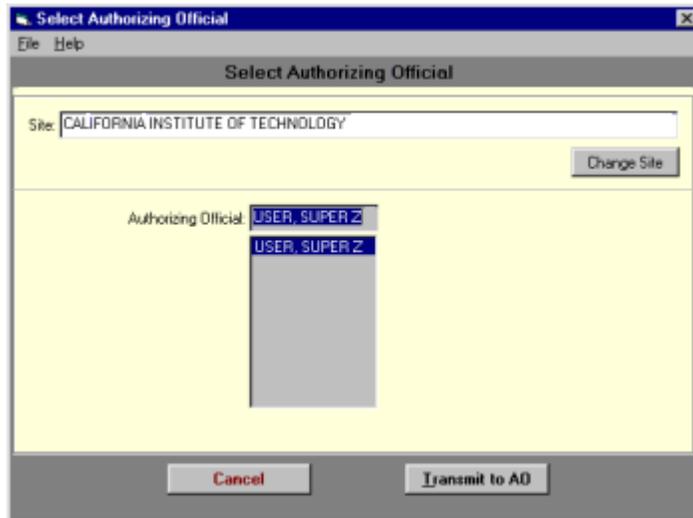
- **Method 1:** - Click the **Send to AO** button at the bottom of the **Request for Advance** screen.



- **Method 2:** - Click on the **File** menu at the top of the **Request for Advance** screen, then **click** on the **Send to AO** option.
- **Method 3:** - **Point** and **click** on the desired Request for Advance listed in the Claims List on the **UTS Request Status** screen, then **click** the **Send to Auth** button.



- **Method 4:** - **Point** and **click** on the desired Request for Advance listed in the Claims List on the **UTS Request Status** screen, then **click** on the **File** menu. From the **File** drop down menu, select **Send to Authorizing Official**.
 1. After using one of the various Release methods, the **Select Authorizing Official** screen appears requiring the user to select an AO.



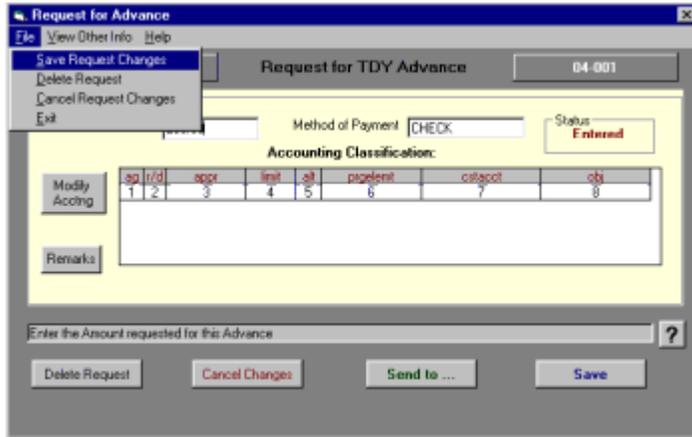
2. At this screen, the name of the traveler's unit will be displayed at the **Site** field and the designated Authorizing Officials are listed below. If the correct AO is listed, **click** on the desired name, then **click** on the **Transmit to AO** button. The user can also **click** on the **Change Site** button to select a different unit and see a list of Authorizing Officials for the newly selected unit.
3. After selecting an AO, a pop-up appears requiring the entry of a **Confirmation Password**. This is the **Secondary Password** that was created when the user's Personal **Profile** was created. **Type** the confirmation password and **click** the **Done** button.
4. After entering the confirmation password, UTS **forwards** the transaction to the **AO** and returns to the **UTS Request Status** screen.

Saving Request for Advance

There are two ways to **save** a Request for Advance:

Saving a Request for Advance:

- **Method 1:** - Click the **Save** button at the bottom of the **Request for Advance** screen.



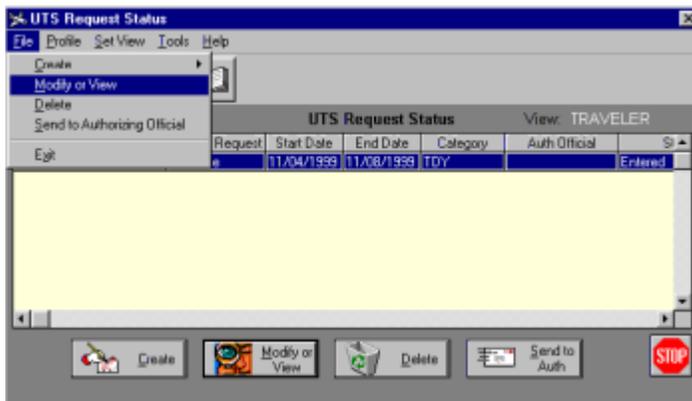
- **Method 2:** - Click on the **File** menu at the top of the **Request for Advance** screen, then click on **Save Request Changes & Return**.

Viewing Request for Advance

On occasion, it may be necessary to **View** a Request for Advance that has been created and saved. This can be accomplished using two different methods.

Viewing a Request for Advance:

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Request Requiring Action** screen, **point and click** on the desired Request for Advance displayed in the Claims List. After selecting a request, use one of the following methods to view the request.



- **Method 1** - Click the **File** menu and then select the **Modify or View** option.

- **Method 2** - Click the **Modify or View** button at the bottom of the screen.

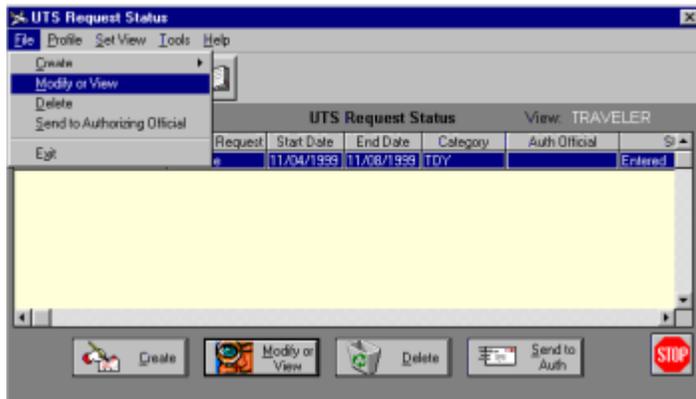
Tip: When finished **Viewing** the request, click the **Cancel Changes** button, the **Save** button, or the **X** in the top right hand corner of the **Request for Advance** screen, and answer **Yes**.

Modifying Request for Advance

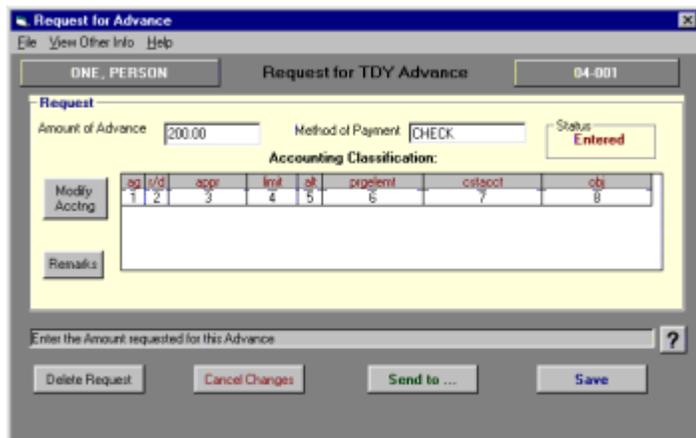
On occasion, it may be necessary to **Modify** a Request for Advance that has been created and saved. This can be accomplished using two different methods.

Modifying a Request for Advance:

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Request Requiring Action** screen, **point** and **click** on the desired Request for Advance displayed in the Claims List. After selecting a request, use one of the following methods to make modifications:



- **Method 1:** - Click the **File** menu and then select the **Modify or View** option.
 - **Method 2:** - Click the **Modify or View** button at the bottom of the screen.
3. At the **Request for Advance** screen, press *Enter* or *Tab* to move through the input fields, or **point** to the desired field and **click** the left mouse button. **Type** the required change or **select** a new option as needed.



-
4. The **Accounting Appropriation** can be modified by **clicking** on the **Modify Acctng** button. When the Request Accounting screen appears, enter a new appropriation, modify the previously entered appropriation, or modify the accounting remarks, if necessary. **Click** the **Validate Accounting** button at the bottom of the **Request Accounting** screen when finished to save the changes and return to the previous screen.
 5. The Request for Advance **Remarks** can be modified by **clicking** on the **Remarks** button, then typing the desired changes. **Click** on the **Return** button at the bottom of **Request Remarks** screen when finished to save the changes and return to the previous screen.
 6. After making the desired changes, **click** the **Save** button at the bottom of the **Request for Advance** screen.

See Also

[Entering Accounting](#)

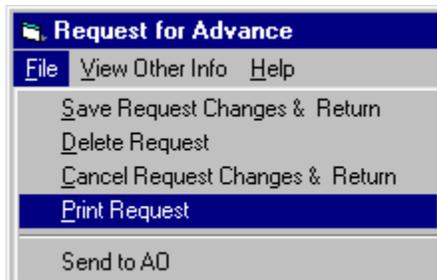
[Entering Remarks](#)

[Saving Request for Advance](#)

Printing Request for Advance

There are two ways to **print** a Request for Advance:

1. **Click** the **Print Request** button at the bottom of the **Request for Advance** screen.
2. **Click** on the **File** menu at the top of the **Request for Advance** screen, then **click** on the **Print Request** option.



Travel Settlements

About Travel Settlements

- The UTS program provides the user with the capability to create a **Request for Settlement** for TDY, Local and MILPCS travel. Settlement claims are used to calculate the allowances the Traveler is entitled to for performing the ordered travel. Upon completion of the travel, settlements are entered into UTS by either the **Traveler**, **Proxy**, or **Signature Proxy**.
- Once approved by the **Authorizing Official**, settlement claims are **transferred** to IATS for computation.
- A **Request for Settlement** cannot be created unless there is an approved **Travel Authorization** or **Travel Order** record in the database.

Creating Request for 1351-2 Settlement

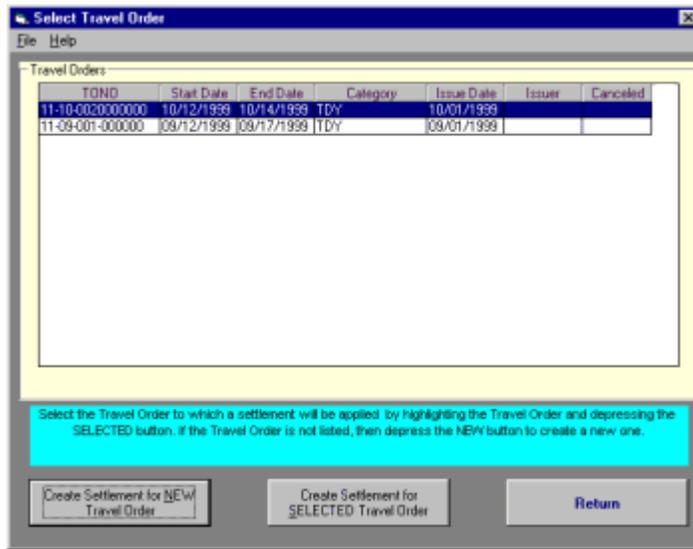
When there is an approved **Travel Authorization** or **Travel Order** record in the database, a **Request for 1351-2 Settlement** may be created by either a **Traveler**, **Agency Proxy**, or a **Signature Proxy**.

The steps involved in creating a Request for 1351-2 Settlement depend on which of the following **View** modes is used:

- **Traveler**
- **Proxy**
- **Signature Proxy**

Creating Request for 1351-2 Settlement - Traveler View

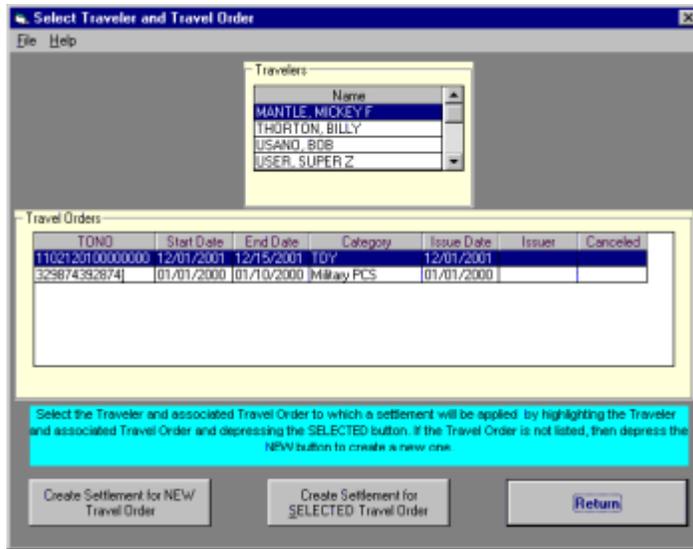
1. Login to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for TDY** or **MILPCS Travel Settlement** screen:
 - **Method 1:** Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler Order** screen appears.
 - **Method 2:** Click on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.



3. At this screen **point** and **click** on an order displayed in the table and then **click** the **Create Settlement for Selected Order** button. If the correct order is not displayed, **click** on the **Create Settlement for New Travel Order** button.
4. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for TDY or MILPCS Settlement** screen appears.
5. Complete the **Request for Settlement** screen. Refer to the **links** listed below under the heading “**See Also** for additional instructions.

Creating Request for 1351-2 Settlement - Proxy View

1. Login to UTS as a **Proxy** or **change the view** to Proxy if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for TDY or MILPCS Travel Settlement** screen:
 - **Method 1:** - **Click** on the **Fill out** button. A drop down menu appears listing a variety of travel actions. **Click** on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.
 - **Method 2:** - **Click** on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. **Click** on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.



3. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name** and any travel authorizations or travel orders that have already been created will appear in the **Travel Orders** table.
4. **Point** and **click** on an order displayed in the Travel Orders table and then **click** the **Create Settlement for Selected Order** button. If the correct order is not displayed, **click** on the **Create Settlement for New Travel Order** button.
5. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for TDY or MILPCS Settlement** screen appears.
6. Complete the **Request for Settlement** screen. Refer to the **links** listed below under the heading "**See Also**" for additional instructions.

See Also

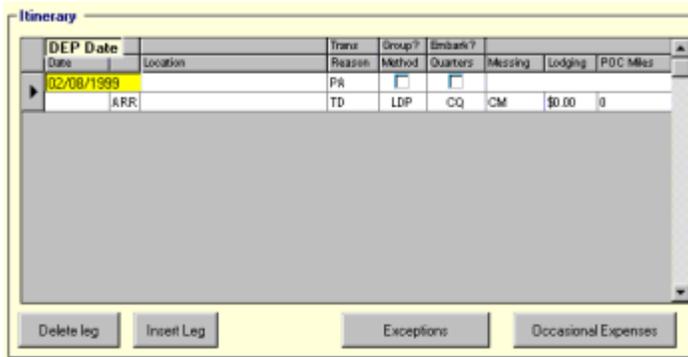
- [Entering TDY Settlements](#)
- [Entering MILPCS Settlements](#)
- [Request for 1351-2 Settlement Itinerary](#)
- [Reason for Stop](#)
- [Method of Reimbursement](#)
- [Entering Reimbursable Expenses](#)

Request for Settlement - Itinerary

The **Itinerary** section is used to record the details regarding the trip.

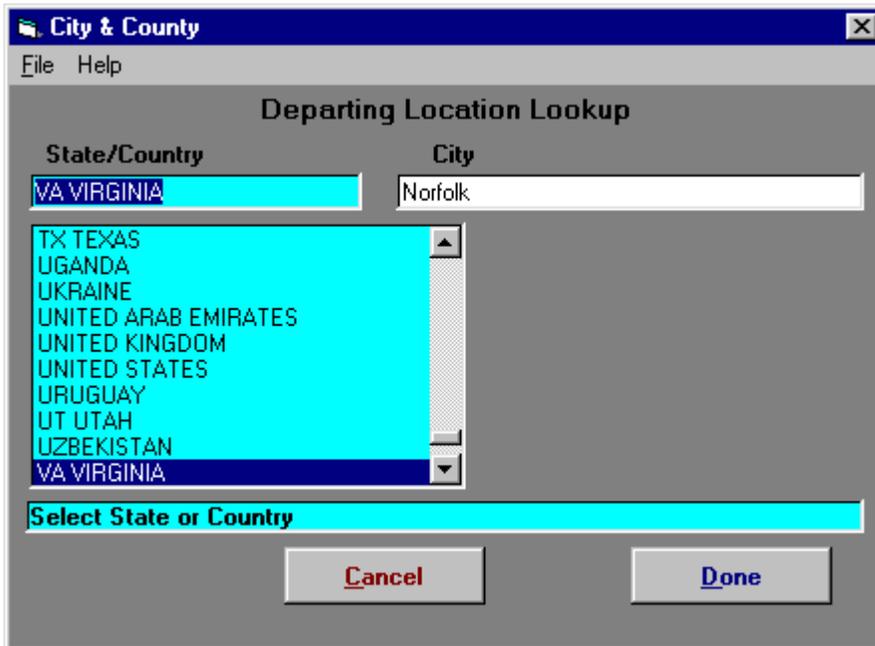
Note: If a **Travel Authorization** was previously created and approved by the AO, the itinerary previously entered on the authorization is automatically copied to the Itinerary section. The user should review this default itinerary and make any necessary changes, if applicable.

 **Complete the Itinerary by entering the following information:**



DEP Date	Location	Trans Reason	Method	Group?	Embark?	Quarters	Missing	Lodging	POC Miles
02/08/1999	ARR	TD	LDP	CQ	CM		\$0.00		0

- **Depart Date** - The departure **date** on the first line of the itinerary automatically defaults from the **beginning date** entered at the **Period Covered** field in the **Top** section of the Travel Order. Press *Enter* to continue or type a different date if necessary.
- **Depart Location** - At this field, the **Location Lookup** screen automatically appears.



City & County

File Help

Departing Location Lookup

State/Country: VA VIRGINIA

City: Norfolk

TX TEXAS
UGANDA
UKRAINE
UNITED ARAB EMIRATES
UNITED KINGDOM
UNITED STATES
URUGUAY
UT UTAH
UZBEKISTAN
VA VIRGINIA

Select State or Country

Cancel Done

At the **State/Country** field, type the first letter of the state or country then **click** the *Up/Down* **arrows** until the desired name is displayed. **Click** on the **name** to select.

At the **City** field, type the first two letters of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.

- **Transportation** - At this field, a drop down listing of various transportation modes appears. **Click** the *Up/Down* **arrows** until the desired mode is displayed. **Click** on the correct **mode** to select.
- **Group ?** - When **Group Travel Rules** has been activated in the **Top** section of the Travel Order, and the transportation mode is **PP, CP, CV, GP, GV, TP, TV, AF, CS**, the user must specify whether Group Travel rules apply. If Group Travel rules apply to the leg, **click** this box.

Note: When **Group Travel** rules are selected, the computation program will not calculate any **per diem** for the Group Travel leg.

- **Arrive Date** - The **date** at the previous **Departure Date** field **defaults** to the Arrival Date field. Press *Enter* to accept this date or type a new date if necessary.
- **Arrive Location** - Use the **same method** explained at the **Depart Location** field to complete the Arrive Location field. This should be the location where the traveler stops to perform **official duty**.
- **Reason for Stop** - At this field, a drop down listing of various **reasons** for stopping appears. The **default** value for this field is **TD - Temporary Duty**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired reason is displayed. **Click** on the correct reason to select.
- **Method of Reimbursement** - At this field, a drop down listing of various per diem computation **methods** appears. The **default** value for this field is **LDP - Lodgings Plus**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired method is displayed. **Click** on the correct method to select.
- **Quarters** - At this field, a drop down listing of various lodging types appears. The **default** value for this field is **CQ - Commercial Lodging**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired type is displayed. **Click** on the correct type to select.
- **Messing** - At this field, a drop down listing of various meal types appears. The **default** value for this field is **CM - Commercial Meals**. Press *Enter* if this is correct. If not, **click** the *Up/Down* **arrows** until the desired type is displayed. **Click** on the correct type to select.
- **Lodging Cost** - At this field, enter the daily lodging cost for the location where the traveler remained overnight.
- **POC Miles** - At this field, enter the official distance for the ordered travel if a privately owned vehicle was used.

Note: Use the procedures previously explained to complete the return travel leg or additional travel legs for the itinerary. When finished with the itinerary, complete the **Reimbursable Expenses** section, if necessary, or **save** the claim and release it to the **Authorizing Official** for **approval**.

See Also

[Entering Dates](#)

[Reason for Stop](#)

[Inserting Itinerary Legs](#)

[Deleting Itinerary Legs](#)

[Request for Settlement - Reimb. Expenses](#)

[Exceptions](#)

[Occasional Expenses](#)

[Deleting Request for 1351-2 Settlement](#)

[Canceling Request for 1351-2 Settlement](#)

[Saving Request for 1351-2 Settlement](#)

[Printing Request for 1351-2 Settlement](#)

[Releasing Request for 1351-2 Settlement](#)

Reason for Stop

When completing an Itinerary, a **Reason for Stop** code is required on each arrival line. A table appears at the Reason for Stop field displaying a variety of codes that may be used.

Reason for Stop	rters	Missing
PA		<input type="checkbox"/>
AT - Awaiting Transportation		
AT - Awaiting Transportation		
TD - Temporary Duty		
LV - Leave		
AD - Authorized Overnight Delay		
VR - Voluntary Return		
ES - Enroute Stop Over		

The purpose of the code is to determine what action must be taken by the travel computation system and what allowances are applicable. A **listing** of the various **Reason for Stop** codes and an **explanation** of their purpose is provided below:

- **AT - Awaiting Transportation** - This is used when the traveler is simply stopping at a location to change the mode of transportation.
- **TD - Temporary Duty** - This is the default value at this field since it is the most common reason a traveler stops. Use this code when the point the traveler arrived at is the TDY point.
- **LV - Leave** - Use this code when the traveler has stopped at a location for the purpose of taking leave. This code will cause the computation system to terminate per diem during the leave period.
- **MC - Mission Complete** - Use this code when the trip is finished and the traveler has arrived at the Permanent Duty Station (PDS).
- **AD - Authorized Delay** - Use this code when the traveler has made an official stop and remained overnight while enroute to an official duty point.
- **VR - Voluntary Return** - Use this code when a traveler has voluntarily returned to the PDS during a TDY trip. This commonly occurs when travelers are on lengthy TDY trips and there is a holiday weekend involved. Using this code causes the computation system to perform a cost comparison of what it would have cost the government had the traveler remained at the TDY location. This cost is then compared to the expenses the traveler incurred for performing the VR travel. The traveler is reimbursed these travel expenses up to what it would have cost the government to remain at the TDY location.

Note: The following Reason For Stop Codes apply to **MILPCS** travel:

- **DV - Drop Off Vehicle At Vehicle Port** - Use this code when the purpose of the stop is to drop off a Privately Owned Vehicle (POV) at a vehicle port facility for overseas shipment.
- **PV - Pick Up Vehicle At Vehicle Port** - Use this code when the purpose of the stop is to pick up a POV from a vehicle port facility for movement to a new PDS.
- **ES - Enroute Stopover** - Use this code when the traveler has made an official stop and remained overnight while enroute to an official duty point. (This code may also be used with TDY travel).
- **DP Drop Off Passengers** - Use this code when the purpose of the stop is to drop off passengers at a passenger facility. This ordinarily occurs when delivering a POV to a vehicle port facility for overseas shipment in conjunction with a PCS and passengers are dropped off first.

-
- **PP - Pick Up Passengers** - Use this code when the purpose of the stop is to pick up passengers at a passenger facility. This ordinarily occurs after a POV is picked up from a vehicle port facility in conjunction with a PCS and the passengers are picked up afterwards.
 - **DL - Designated Location** - Use this code when the stop location is a point designated as a delay point for dependents pending orders for overseas PCS travel, or when overseas travel is denied. This is also the appropriate code to identify a location as Consecutive Overseas Tour (COT) leave point.
 - **HP - Change of Home Port** - Use this code when the purpose of the stop is deliver a POV at the new Home Port and the traveler returns to the old Home Port pending enroute travel.

Method of Reimbursement

A **Method of Reimbursement** code is used to determine what per diem **entitlement rule** is applicable for the trip. When completing an Itinerary, a Method of Reimbursement code is required on each arrival line where the reason for stop code is **TD**, **AD**, or **ES**. A table appears at the Method of Reimbursement field displaying a variety of codes that may be used. Following, is a list of the Method of Reimbursement codes listed by UTS and an explanation of their meanings:

- **LDP - Lodgings Plus**. This is the **most common** per diem reimbursement method. Under the lodgings plus rules, the traveler is entitled to the actual amount spent for lodging, not to exceed the maximum rate established for the locality, plus a flat amount for meals and incidental expenses (M&IE), that has also been pre-determined. For example; under the Lodgings Plus rules, the maximum locality rate for Washington DC is \$115 for lodging and \$46 for M&IE. If the traveler actually pays \$110 for lodging, the entitlement will be \$161 for the day.
- **FD - Field Duty**. This is the method that should be used when the traveler is performing temporary duty under field conditions. Under this reimbursement method, **no per diem** is payable. This prohibition begins at **0001** on the day after the field duty begins and terminates at **2400** on the day prior to the day the field duty ends.
- **SD - Sea Duty**. This is the method that should be used by all Coast Guard members when performing temporary duty on-board a **US Government Vessel**. Under this reimbursement method, **no per diem** is payable. This prohibition begins at **0001** on the day after the traveler arrives on-board and terminates at **2400** on the day prior to the day the traveler departs.
- **LTT - Long Term Training**. This reimbursement method applies to **civilian employees** of the federal government only. Under this reimbursement method, the employee is entitled to **55%** of the **maximum rate established for the locality**. There are **two** criteria for this entitlement rule. The first criteria is that the purpose of the TDY is for **training** and is for a period of more than 30 days. The second criteria is that the purpose for the TDY is **any reason** and is for a period of more than 180 days.
- **AE - Actual Expense**. This is the method that should be used when it has been determined that the standard locality per diem rate will not adequately cover the expenses, and reimbursement of **Actual Expenses** for both lodging and M&IE is being requested or approved. Under this method, the standard locality per diem rate is increased by **150%**.

Tip: When AE is selected as the Method of Reimbursement, the user must **click** on the **Exceptions** button after completing the itinerary and then enter the amounts spent for M&IE at the **Daily Exceptions** screen.

- **AELP - Actual Expense Lodgings Plus**. This is the method that should be used when it has been determined that the standard locality per diem rate will not adequately cover the expenses for lodging, and reimbursement of **Actual Expenses** for lodging only is being requested or approved. Under this method, the standard locality per diem rate, for lodging only, is increased by **150%**. The M&IE is reimbursed using the standard flat rate established for the locality.

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- **NPD - No Per Diem.** This is the method that should be used when the traveler is not entitled to per diem while performing official duty travel. Some examples of travel situations when this rule may apply are **Auxiliarist**, **Emergency Leave**, and **Medical Patient** travel.
 - **INP - Inpatient Hospital.** This is the method that should be used when the traveler has been admitted to a hospital as an inpatient. Under this reimbursement method, **no per diem** is payable. This prohibition begins at **0001** on the day after the patient is admitted and terminates at **2400** on the day prior to the day the patient is discharged.
 - **REH Rehabilitation Center.** This is the method that should be used when the traveler has been admitted to a Rehabilitation Center as an inpatient. Under this reimbursement method, **no per diem** is payable. This prohibition begins at **0001** on the day after the patient is admitted and terminates at **2400** on the day prior to the day the patient is discharged.
 - **AF - Alaskan Ferry.** This is the method that should be used when the traveler has boarded the **Alaska Marine Highway System**, a.k.a., the Alaskan Ferry. While on board this ferry, a per diem (M&IE) equal to the highest CONUS M&IE to cover meal and incidental expenses is payable for each full day. Per diem is payable for the day of arrival (embarkation) on board the ferry at the rate applicable to the port of embarkation.
 - **BC Boot Camp.** This is the method that should be used by Reservists who are traveling from their home to their Basic Training location and return. While at the training location, **no per diem** is payable. This prohibition begins at **0001** on the day after the traveler arrives and terminates at **2400** on the day prior to the day the traveler departs.
 - **SAE - Super Actual Expense.** This is the method that should be used when it has been determined that the standard locality per diem rate will not adequately cover the expenses, and reimbursement of **Actual Expenses** for **both lodging** and **M&IE** is being requested or approved. Under this method, the standard locality per diem rate is increased by **300%**. This method is typically used for relief missions associated with **disasters**.

Tip: When **SAE** is selected as the Method of Reimbursement, the user must **click** on the **Exceptions** button after completing the itinerary and then enter the amounts spent for M&IE at the **Daily Exceptions** screen.

- **SAEL - Super Actual Expense & Lodgings Plus.** This is the method that should be used when it has been determined that the standard locality per diem rate will not adequately cover the expenses for lodging, and reimbursement of **Actual Expenses** for **lodging only** is being requested or approved. Under this method, the standard locality per diem rate, for **lodging only**, is increased by **300%**. The M&IE is reimbursed using the standard flat rate established for the locality. This method is typically used for relief missions associated with **disasters**.
- **OB - On Board Ship.** This is the method that should be used by individuals who are **not** Coast Guard members and are performing temporary duty on-board a **US Government Vessel**. Under this reimbursement method, civilian employees are entitled to a per diem rate of \$2 per day when meals are provided at no cost. If the employee is required to pay for meals, the government meal rate (currently \$7.50) applies. In addition, an additional \$2 per day is reimbursed if the employee is required to pay for lodging while on-board. This entitlement rule begins at **0001** on the day after the traveler arrives on-board and terminates at **2400** on the day prior to the day the traveler departs.
- **FLT - Flat Per Diem.** This is the method that should be used when a **special per diem rate**, other than the rate specified for the locality, is directed in the travel orders.

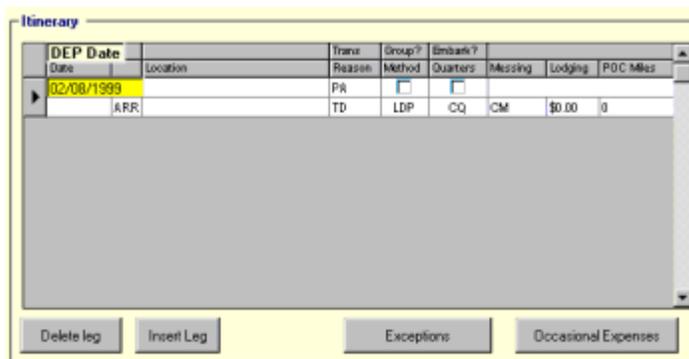
Exceptions

When an itinerary is entered, UTS prompts for the **Daily Lodging Rate** and the type of **Quarters** and **Meals** applicable at each stopover location. These values are used as the **default** for the inclusive period involved. On occasion, however, it may be necessary to deviate from the default values. The lodging rate may have been different on a particular day or there may have been a deductible or government meal available that is not reflected in the default values. If this situation occurs, the **Exceptions** function can be used for making adjustments on a daily basis.

Note: The **Exceptions** function must be used to capture the daily expenses for meals and incidental expenses if the traveler was authorized **Actual Expenses** for both **lodging** and **meals** at the official duty point.

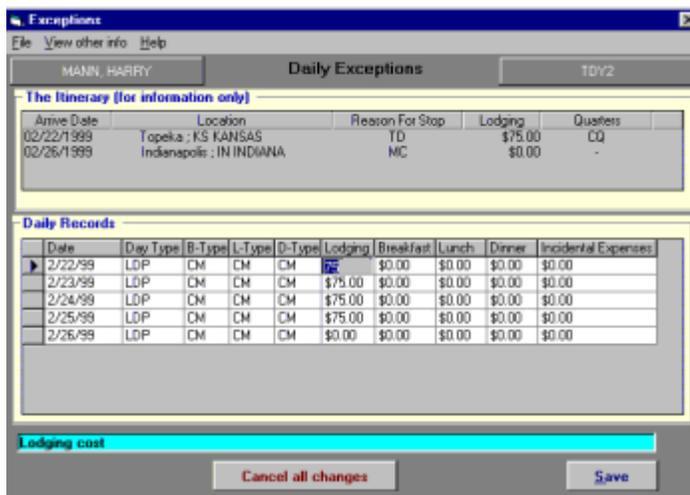
Complete the following steps to process an Exception:

1. The **Exceptions** button is located just below the itinerary on the **Trip** screen. **Click** this button.



DEP Date	Location	Trans Reason	Group Method	Embark Quarters	Missing	Lodging	POC Miles
02/08/1999	ARR	TD	LDP	CQ	CM	\$0.00	0

2. After clicking on the **Exceptions** button, the **Daily Exceptions** screen appears.



Arrive Date	Location	Reason For Stop	Lodging	Quarters
02/22/1999	Topeka : KS KANSAS	TD	\$75.00	CQ
02/26/1999	Indianapolis : IN INDIANA	MC	\$0.00	-

Date	Day Type	B-Type	L-Type	D-Type	Lodging	Breakfast	Lunch	Dinner	Incidental Expenses
2/22/99	LDP	CM	CM	CM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
2/23/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/24/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/25/99	LDP	CM	CM	CM	\$75.00	\$0.00	\$0.00	\$0.00	\$0.00
2/26/99	LDP	CM	CM	CM	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

3. At this screen, adjustments can be made in the following areas for any listed day:
 - Breakfast, Lunch, and Dinner **Type**
 - Lodging **Cost**
 - Breakfast, Lunch, Dinner and Incidental Expenses **Cost**

4. **Point** and **click** in the desired input field.
5. If changing a **meal type**, a drop-down listing of various meal types appears. **Point** and **click** on the new meal type to make a selection.
6. If changing the lodging, meals, or incidental expenses cost, simply **type** the new dollar amount.
7. When finished **click** the **Save** button.

Occasional Expenses

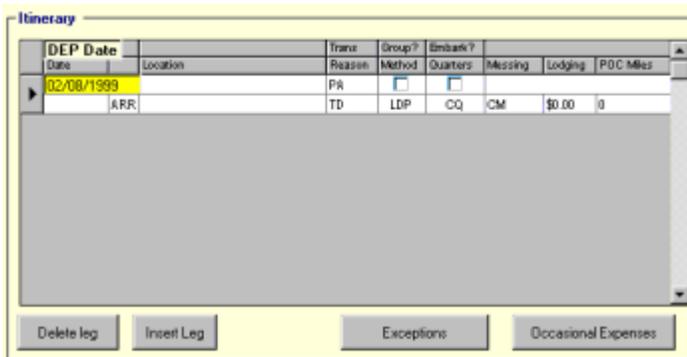
For certain types of travel situations, per diem is not payable. If a traveler is required to use personal funds to purchase meals or lodging, however, these expenses are considered to be **Occasional Expenses**. Reimbursement for the purchase of occasional expenses typically occur under one of the following circumstances:

- **Round Trip** performed in **12 Hours or Less**
- Duty on board a **Government Ship**
- **Field Conditions**

If one of these situations apply, the **Occasional Expenses** screen is used to capture the expenses for lodging and meals purchased by the traveler with personal funds.

Complete the following steps to make input for Occasional Expenses:

1. The **Occasional Expenses** button is located just below the itinerary on the **Trip** screen. **Click** this button.



DEP Date	Location	Trans Reason	Group Method	Embark Quarters	Missing	Lodging	POC Miles
02/08/1999	ARR	TD	LDP	CQ	CM	\$0.00	0

Buttons: Delete leg, Insert Leg, Exceptions, Occasional Expenses

2. After clicking on this button, the **Occasional Expenses** screen appears.

3. At this screen, make the required input at each of the following fields:
 - **Date** - Enter the date in which the occasional expense was incurred.
 - **Type of Expense** - At this field, a drop down listing appears displaying various types of occasional expenses. **Point** and **click** on the desired type.
 - **Amount** - **Type** the dollar amount claimed for the occasional expense.
 - **Location** - The location entered at this field should be the location where the official duty was performed or the traveler remained overnight. At this field, **click** on the **Choose City** button and the **Location Lookup** screen appears. At the **State/Country** field, type the first letter of the state or country then **click** the **Up/Down arrows** until the desired name is displayed. **Click** on the **name** to select. At the **City** field, type the first two letters of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.
4. When finished with the input, **click** on the **Save** button.

Request for Settlement - Reimb. Expenses

The **Reimbursable Expenses** section is used to record the expenses incurred that were not associated with per diem. Complete this section by entering the following information:

- **Date** - At this field, enter the **date** of the expense.

- **Nature of Expense** - At this field, a drop down listing of various expense items appears. **Click** the *Up/Down* **arrows** until the desired expense item is displayed. If the user types the first letter of the description, UTS scrolls the listing until locating the first item beginning with this letter. The user may then use the *Up/Down* arrows to display the exact item. Once the correct item is displayed, **click** on this item to select.
- **Claimed** - At this field, enter the amount claimed by the traveler.

When finished entering the reimbursable expenses, take the required action to **save** the claim and **forward** it to the **Authorizing Official** for **approval**.

See Also

[Inserting Expense](#)

[Deleting Expense](#)

[Exceptions](#)

[Occasional Expenses](#)

[Deleting Request for 1351-2 Settlement](#)

[Canceling Request for 1351-2 Settlement](#)

[Saving Request for 1351-2 Settlement](#)

[Printing Request for 1351-2 Settlement](#)

[Releasing Request for Settlement](#)

Deleting Request for 1351-2 Settlement

There are several ways to **delete** a Request for 1351-2 Settlement. The method to use, however, depends on which input screen is currently displayed.

Deleting a Request for 1351-2 Settlement:



1. Log into UTS and **change the view** to Traveler, or Proxy, if necessary.
2. At the **UTS Request Status** screen, use one of the following methods:
 - **Method 1:** - **Point** and **click** on the desired Settlement listed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Delete** option. A pop-up appears asking if you are sure you wish to delete this claim. **Click** on **Yes**.

- **Method 2: - Point and click** on the desired Settlement listed in the Claims List. After selecting a claim, **click** the **Delete** button at the bottom of the screen. A pop-up appears asking if you are sure you wish to delete this claim. **Click** on **Yes**.
- **Method 3: - Point and click** on the desired Settlement listed in the Claims List. After selecting a claim, **click** the **Modify or View** button. The **Request for TDY or MILPCS Settlement** screen appears depending on the type of claim selected. At this screen, **click** the **Delete Request** button. A pop-up appears stating “**Deleting this Request?**”. **Click** on **Yes**.

Tip: The details for a particular **Trip** or **Expense** can also be deleted by **clicking** on the desired **trip** or **expense** appearing in the **Trips Taken** or **Expenses Claimed** box and then **clicking** on the **Delete** button.

Trip	Dates Encompassed	Amount	Status	
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass	Itinerary
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass	View/Modify
				Print Expense
				Delete

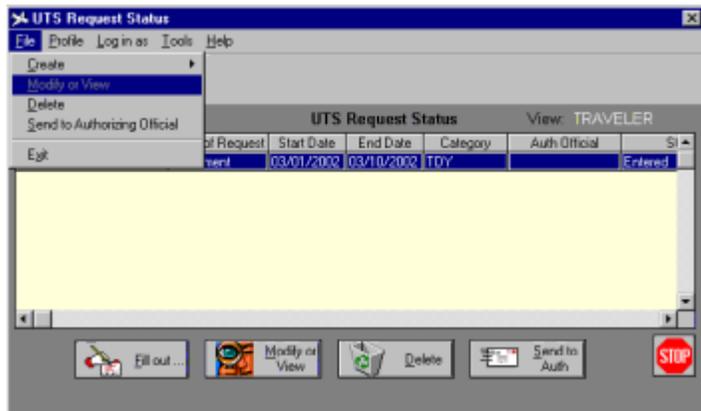
Modifying Request for 1351-2 Settlement

On occasion, it may be necessary to **Modify** a Request for 1351-2 Settlement that has been created and saved.

Regardless of whether the user is logged into UTS as a **Traveler**, **Proxy**, or **Authorizing Official**, the process for modifying a Request for 1351-2 Settlement is essentially the same. The only difference is that the name of the initial screen is titled (**UTS Request Status**) for the **Traveler** and **Proxy**. For the **AO**, this screen is titled (**UTS Requests Requiring Action**).

Use one of the following methods to Modify a Request for 1351-2 Settlement:

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Request Requiring Action** screen, there are two methods for accessing the **Request for TDY or MILPCS Settlement** screen.



- **Method 1: - Point and click** on the desired Settlement displayed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Modify or View** option.
- **Method 2: - Point and click** on the desired Settlement displayed in the Claims List. After selecting a claim, **click** the **Modify or View** button.

- At the **Request for Settlement** screen, press *Enter* or *Tab* to advance through the input fields, or **point** to the desired field and **click** the left mouse button. **Type** the required change or **select** a new option as needed.
- The **Trip** screen can also be modified by **clicking** on the desired **trip** or **expense** appearing in the **Trips Taken** or **Expenses Claimed** box and then **clicking** on the **View/Modify** button.

Trip	Dates Encompassed	Amount	Status
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass

Buttons: Itinerary, View/Modify, Print Expense, Delete

Note: Click the **View/Modify** button in the **Trips Taken** or **Expenses Claimed** section to modify the **Itinerary**, **Exceptions**, **Occasional Expenses**, or **Reimbursable Expenses** screens.

- After making the desired changes, **click** the **Save** button.

See Also

[Request for Settlement - Itinerary](#)

[Exceptions](#)

[Occasional Expenses](#)

[Request for Settlement - Reimb. Expenses](#)

[Saving Request for 1351-2 Settlement](#)

Canceling Request for 1351-2 Settlement

There are several ways to cancel the initial input or changes being made to a Request for Settlement. The cancel function will only delete the current input, however. If the request has been saved previously, the **Delete Request for 1351-2 Settlement** option must be used to completely remove the request.

 Use one of the following methods to **Cancel the input to a Request for 1351-2 Settlement**:

- Method 1:** - Click the **Cancel** button at the bottom of the **Trip** screen if you wish to cancel this screen and return to the previous screen. A pop-up appears asking if you wish to cancel this screen. **Click on Yes**. This action will cancel the trip and return the user to the **Request for Settlement** screen.

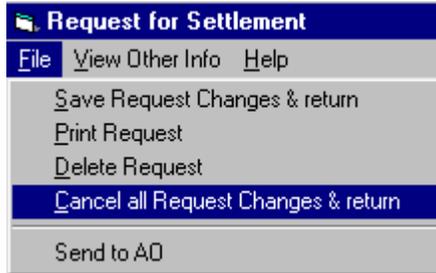


- Method 2:** - Click the **File** menu at the top of the **Trip** screen then **click** on the **Cancel all Changes** option. A pop-up appears asking if you wish to cancel this screen. **Click on Yes**. This action will cancel the trip and return the user to the **Request for Settlement** screen.
- Method 3:** - Click the **Cancel all Changes** button at the bottom of the **Exceptions** or **Occasional Expenses** screen if you wish to cancel the input to one of these screens and return to the previous screen. A pop-up appears asking if you wish to cancel this screen. **Click on Yes**.



- Method 4:** - Click on the **File** menu at the top of the **Request for Settlement** screen, then **click** on the **Cancel all Request Changes & return** option. A pop-up appears asking if you wish to

cancel this screen. **Click on Yes.** This action actually cancels all of the input made to the settlement.



See Also

[Deleting a Request for 1351-2 Settlement](#)

Releasing Request for 1351-2 Settlement

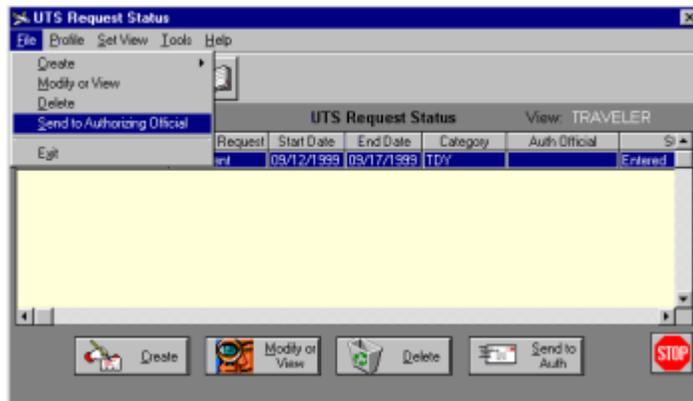
There are several ways to release a Request for Settlement. This process can be performed by either the **Traveler** or the **Signature Proxy** designated by the Traveler.

 **Use one of the following methods to release a Request for 1351-2 Settlement:**

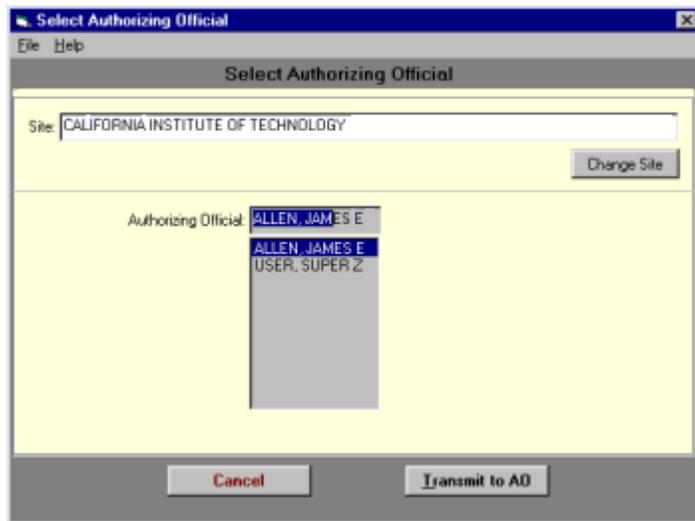
1. Login to UTS. Afterwards, **change the view** to Traveler or Proxy, if necessary.
- **Method 1:** - **Click the Send to** button at the bottom of the **Request for Settlement** screen and then **click on Send to AO**.



- **Method 2:** - **Point and click** on the desired Settlement listed in the Claims List on the **UTS Request Status** screen, then **click the Send to Auth** button.



- **Method 3:** - **Click** on the desired Settlement listed in the Claims List on the **UTS Request Status** screen, **click** on the **File** option, then **click** on the **Send to Authorizing Official** option.
2. After using one of the (3) methods to release the settlement, the **Select Authorizing Official** screen appears requiring the user to select an AO.



3. At the **Select Authorizing Official** screen, the name of the traveler's unit will be displayed at the **Site** field and the designated Authorizing Officials are listed below. If the correct AO is listed **click** on the desired name, then **click** on the **Transmit to AO** button. The user can also **click** on the **Change Site** button to select a different unit and see a list of Authorizing Officials for the newly selected unit.
4. After selecting an AO, a pop-up appears requiring the entry of a **Confirmation Password**. This is the **Secondary Password** that was created when the user's Personal **Profile** was created.
5. After entering a confirmation password, UTS **forwards** the transaction to the **AO** and returns to the **UTS Request Status** screen.

Printing Request for 1351-2 Settlement

There are three ways to **print** a Request for 1351-2 Settlement:

1. **Click** the **Print Request** button at the bottom of the **Request for Settlement** or **Trip** screens.
2. **Click** on the **Print Expense** button at the **Trips Taken** or **Expenses Claimed** section of the **Request for Settlement** screen.
3. **Click** on the **File** menu at the top of the **Request for Settlement** or **Trips** screens, then **click** on the **Print Request** option.



Saving Request for 1351-2 Settlement

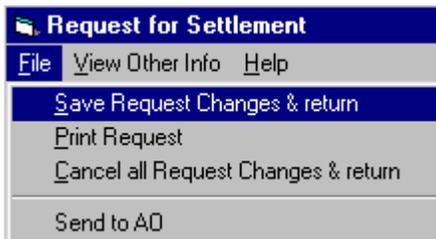
There are several ways to **Save** a Request for 1351-2 Settlement. The method to use, however, depends on which input screen is currently displayed.

Use one of the following methods to Save a Request for 1351-2 Settlement:

- **Method 1:** - Click the **Save** button at the bottom of the **Request for Settlement** screen.



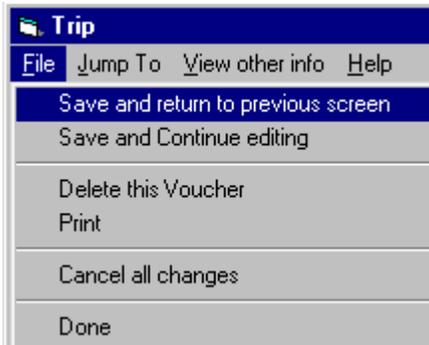
- **Method 2:** - Click the **File** menu at the top of the **Request for Settlement** screen, then **click** on the **Save Request Changes & return** option.



- **Method 3:** - Click the **Save** button at the bottom of the **Trips** screen.



- **Method 4:** - Click the **File** menu at the top of the **Trips** screen, then **click** on one of the two Save options.



- **Method 5:** - Click the **Save** button at the bottom of the **Exceptions** or **Occasional Expenses** screens.



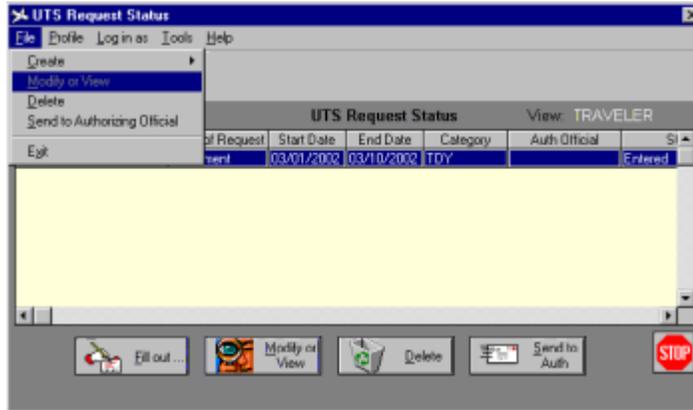
Viewing Request for 1351-2 Settlement

On occasion, it may be necessary to **View** a Request for 1351-2 Settlement that has been created and saved.

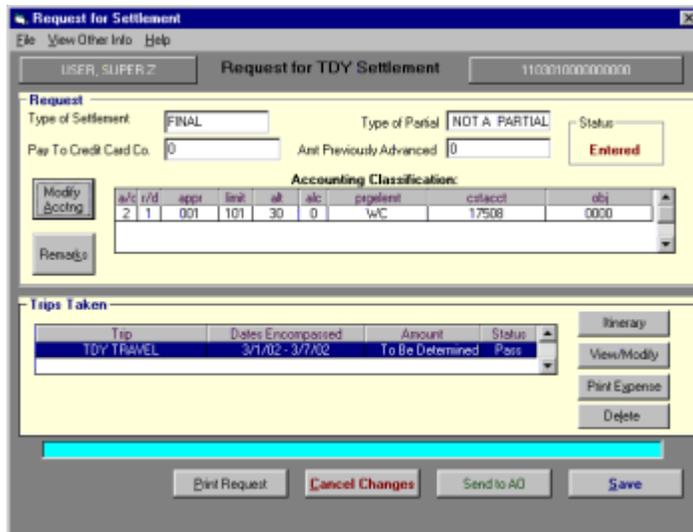
Regardless of whether the user is logged into UTS as a **Traveler**, **Proxy**, or **Authorizing Official**, the process for viewing a Request for Settlement is essentially the same. The only difference is that the name of the initial screen is titled (**UTS Request Status**) for the **Traveler** and **Proxy**. For the **AO**, this screen is titled (**UTS Requests Requiring Action**).

 **Use one of the following methods to View a Request for 1351-2 Settlement:**

1. Login to UTS.
2. At the **UTS Request Status** or **UTS Requests Requiring Action** screen, there are two ways to view the **Request for TDY or MILPCS Settlement** screen:
 - **Method 1:** - **Point** and **click** on the Request for 1351-2 Settlement displayed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Modify or View** option.



- **Method 2:** - **Point** and **click** on the Request for 1351-2 Settlement displayed in the Claims List. After selecting a claim, **click** the **Modify or View** button.
3. After using either method **1** or **2**, the **Request for TDY or MILPCS Settlement** screen appears.



4. At this screen, the user can view the input screens for a **trip** or **expense** by highlighting the desired item and **clicking** the **View/Modify** button.

Note: Click the **View/Modify** button in the **Trips Taken** or **Expenses Claimed** section to view the **Itinerary**, **Exceptions**, **Occasional Expenses**, or **Reimbursable Expenses** screens.

5. When finished **Viewing** the request, **click** the **Cancel Changes** button, the **Save** button, or the **X** in the top right hand corner of the **Request for Settlement** screen, and answer **Yes**.

See Also

[Modifying Request for Settlement](#)

MILPCS Settlements

Entering MILPCS Request for Settlement

The **Request for MILPCS Settlement** screen consists of two sections:

a/c	r/d	acct	limit	alt	alc	p/element	c/accct	obj
2					0			

Expense Type	Dates Encompassed	Amount	Status
TLE TRAVEL	1/8/02-1/10/02	To Be Determined	Pass
ENROUTE TRAVEL	1/1/00-1/7/00	To Be Determined	Pass

- **Request** - This section is used to gather the administrative information.
- **Expenses Claimed** - This section is used to gather the claim specific details for the various types of MILPCS entitlements.

Completing the Request section:

1. **Type of Settlement** - At this field a listing of claim types appears. **Click** on the desired type to make a selection.
2. **Type of Partial** - At this field, a selection of various type of partial settlements can be made by clicking the buttons at the far right of the selection field. If the claim is not a partial settlement, press *Enter* or **click** on the selection **Not A Partial**.
3. **Pay to Credit Card Co.** - This feature is not operational at this time.
4. **Amt Previously Advanced** - This field is used to specify the amount of the PCS funds advanced to the traveler. If the advance was recorded in UTS prior to the processing of the settlement, that amount will be displayed. Users may enter a higher amount if an additional amount was received and was not recorded in UTS. **Type** the dollar amount of the advance received or a different amount, if necessary.
5. **Accounting** - **Click** on the **Modify Acctng** button to access the Request **Accounting** screen.
6. **Remarks** - **Click** on the **Remarks** button to access the **Remarks** Request screen.

Completing the Expenses Claimed section:

When processing settlement requests for MILPCS claims, there is a variety of **entitlements** that may be involved. These entitlements, referred to as expenses, include per diem and transportation

allowances for **En Route Travel**, Temporary Lodging Expense (**TLE**), Temporary Lodging Allowance (**TLA**) and Dislocation Allowance (**DLA**).

The following links provide detailed instructions for performing the functions possible at the **Expenses Claimed** section.

See Also

[Entering Accounting](#)

[Entering Remarks](#)

[Adding an Expense](#)

[View or Modify an Expense](#)

[Printing an Expense](#)

[Deleting an Expense](#)

Adding an Expense

Various MILPCS travel entitlements may be added to a settlement request by **clicking** on the **Add Expense** button on the **Request for MILPCS Settlement** screen and then selecting the desired item from the pop-up listing.



Note: Only items that have been authorized on the **Travel Authorization/Order** may be selected.

To make a selection, **click** the **Add Expense** button. A pop-up appears listing the following PCS entitlements:

- En Route
- TLE
- TLA
- DLA

Only the items that have been authorized on the Travel Authorization/Order are displayed with black lettering. **Click** on any item appearing in black lettering to make a selection.

Entering En Route Travel Expenses

When a Coast Guard member and/or dependents relocate from one permanent duty station to another, the travel and transportation allowances are paid as an **En Route** Travel Expense. This expense is entered into UTS by **clicking** on the **Add Expense** button located on the **Request for MILPCS Settlement** screen, and then clicking on **En Route**. After making this selection, the **Trip** screen appears.

The screenshot shows a software window titled "Trip" with a menu bar (File, Jump To, View other info, Help) and a header area containing "THORTON, BILLY", "Trip", and "3030090394". Below the header are four tabs: "Top", "Dependents", "Itinerary", and "Reimbursable Exp.". The "Top" tab is active, displaying "Miscellaneous Questions" with a checked box for "Owner operator of P.O.V." and a text field for "How many P.O.V.'s used" with the value "0". Below this is a table titled "Who's Being Paid on this Trip" with columns "Name (Last, Middle)" and "Paid?". The table lists "THORTON, BILLY" and "wily", "hilary", "brena", "alle", and "fred", each with a "Paid?" checkbox. The "Itinerary" section shows a table with columns: Date, Location, Trans Reason, Method, Group?, Quarters, Mezzing, Lodging, POC Miles. The data rows are:

Date	Location	Trans Reason	Method	Group?	Quarters	Mezzing	Lodging	POC Miles
01/01/1999	DEP Providence ; RHODE ISLAND	CP						
01/01/1999	ARR Newark ; NEW JERSEY	TD	LDP	CO	CM		\$100.00	
01/16/1999	DEP Newark ; NEW JERSEY	CP						
01/16/1999	ARR Providence ; RHODE ISLAND	MC					\$0.00	

 At the bottom of the window, there is a highlighted question "Is the traveler the owner operator of the P.O.V.?", and buttons for "Delete this Voucher", "Cancel", "Print", and "Save".

The **Trip** screen for a MILPCS settlement consists of four separate sections.

- **Top** - This section is also referred to as the **Miscellaneous Questions** section. If the member/dependent was the owner or operator of the privately owned vehicle (POV), when one was used for the travel, **click** on the **Owner Operator of POV** box. At the **How many POV's used** field, **type** the number of POV's that were used.
- **Dependents** - This section is used to select which dependents are to be included in the expense calculation. At this section, the name of the member and all dependents are listed, if the dependent information was entered when the MILPCS travel order record was created. **Click** the **Included** box next to the name of each person who participated in the En Route travel.
- **Itinerary** - This section captures the details for the **En Route** travel portion of the PCS claim. Please refer the topic "**Request for Settlement - Itinerary**" by **clicking** on the "**Itinerary**" link under the heading **See Also**.
- **Reimbursable Expenses** - This section is used to capture any expenses that are not covered by per diem. Please refer the topic "**Request for Settlement - Reimb. Expenses**" by **clicking** on the "**Reimbursable Expenses**" link under the heading **See Also**".

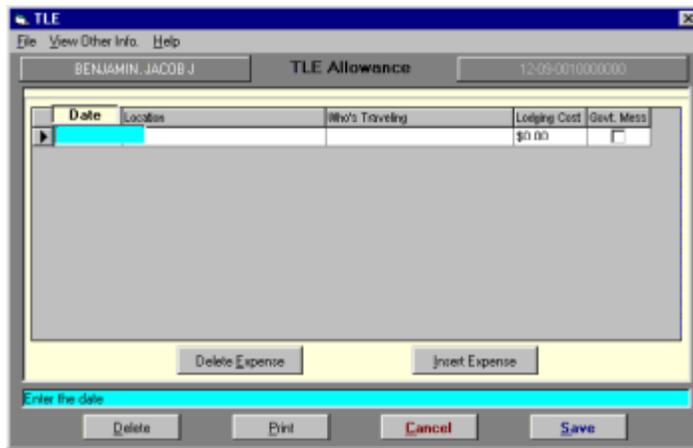
See Also

[Itinerary](#)

[Reimbursable Expenses](#)

Entering TLE/TLA Expense

When a Coast Guard member and/or dependents relocate from one permanent duty station to another, There is normally a period of temporary lodging that may occur at the old duty station, the new duty station, or both. The expenses for this temporary lodging plus meals are paid as a Temporary Lodging Expense (TLE) or Temporary Lodging Allowance (TLA). This expense is entered into UTS by **clicking** on the **Add Expense** button located on the **Request for MILPCS Settlement** screen, and then **clicking** on **TLE** or **TLA**. After making this selection, the **TLE** or **TLA Allowance** screen appears.



Completing the TLE/TLA Allowance screen:

- **Date** - At this field **type** the beginning **date**, in **MMDDYY** format, of the TLE/TLA period.
- **Location** - At this field, the **Location Lookup** screen automatically appears. At the **State/Country** field, **type** the **first letter** of the state or country then **click** the **Up/Down arrows** until the desired name is displayed. **Click** on the **name** to select. At the **City** field, **type** the **first two letters** of the city name. This displays a listing of city names, for the previously selected state or country, beginning with those letters. **Click** on the desired city **name** to select.
- **Who's Traveling** - At this field, the name of the member and all dependents are listed, if the dependent information was entered when the MILPCS travel order record was created. **Click** the box next to the name of each person who was included in the TLE/TLA period.
- **Lodging Cost** - At this field, **type** the **total** amount of the **daily lodging cost** for the member and dependents.
- **Mess/Cooking** - At this field, **click** in the box if there were government dining facilities available or if the temporary lodging had cooking facilities. Press *Enter* to continue.

After pressing *Enter* at the **Mess/Cooking** field, a blank line appears below the line just completed. Continue entering the additional TLE/TLA expenses by entering the next date of the period. Notice that UTS populates every field with the information that was entered on the previous line. Make any needed changes or press *Enter* through each field to continue.

When finished entering the expenses for the TLE/TLA period, **click** the **Save** button.

See Also

[Inserting TLE/TLA Expense](#)

[Deleting TLE/TLA Expense](#)

Inserting TLE/TLA Expense

On occasion, it may be necessary to **insert** a TLE or TLA expense to an already completed period. This could occur if a date had been accidentally skipped.

Date	Location	Who's Traveling	Lodging Cost	Govt. Mess
09/02/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
09/03/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
08/05/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$0.00	<input type="checkbox"/>
09/05/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
09/06/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
			\$0.00	<input type="checkbox"/>

Complete the following steps to insert a TLE or TLA expense:

1. **Point** and **click** in the **date** field where the new expense should be inserted.
2. **Click** on the **Insert Expense** button. UTS will insert a **new** line at the selected location in the expenses listing.
3. **Enter** the required expense information.

See Also

[Entering TLE/TLA Expense](#)

[Deleting TLE/TLA Expense](#)

Deleting TLE/TLA Expense

On occasion, it may be necessary to **delete** a TLE or TLA expense to an already completed period. This could occur if a date had been accidentally entered twice.

Date	Location	Who's Traveling	Lodging Cost	Govt. Mess
09/02/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
09/03/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
09/05/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
08/05/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
09/06/1999	Indianapolis ; INDIANA	BENJAMIN, JACOB J, Julie	\$75.00	<input type="checkbox"/>
			\$0.00	<input type="checkbox"/>

 **Complete the following steps to delete a TLE or TLA expense:**

1. **Point** and **click** in the **date** field of the expense to be deleted.
2. **Click** on the **Delete Expense** button. UTS will delete the line for the date selected.

See Also

[Entering TLE/TLA Expense](#)

[Inserting TLE/TLA Expense](#)

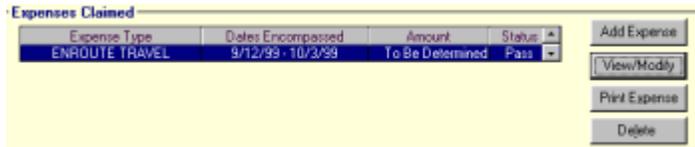
View or Modify an Expense

After a expense has been added to a Request for MILPCS Settlement, the expense may be **reviewed** for accuracy or may be **modified**, if necessary.

Note: The **Traveler** or **Proxy** cannot modify a request that was released to the **AO**, unless the AO returns the request to the Traveler.

 **Complete the following steps to View or Modify a MILPCS expense:**

1. Login to UTS. Afterwards, **change the view** to Traveler, or Proxy, if necessary.
2. Access the **Request for MILPCS Settlement** screen. Refer to the topic "[Modifying Request for 1351-2 Settlement](#)" if additional instructions are needed.



Expense Type	Dates Encompassed	Amount	Status
ENROUTE TRAVEL	9/12/99 - 10/3/99	To Be Determined	Pass

3. At the **Request for Settlement** screen, **click** on the desired **expense** appearing in the **Expenses Claimed** box and then **click** on the **View/Modify** button. Either the **Trip** or **TLE/TLA Allowance** screen appears depending on the type of expense selected.
4. **View** or **modify** the input screens as desired. If any **changes** were made, be sure to take the appropriate action to **save** the changes.

Printing an Expense

The details for a particular MILPCS **expense** may be printed by either the **Traveler**, **Proxy**, or **Authorizing Official**.

 **Complete the following steps to Print a MILPCS expense:**

1. Login to UTS.
2. Access the **Request for MILPCS Settlement** screen. Refer to the topic "[Modifying Request for Settlement](#)" if additional instructions are needed.

Expense Type	Dates Encompassed	Amount	Status
ENROUTE TRAVEL	9/12/99 - 10/3/99	To Be Determined	Pass

Buttons: Add Expense, View/Modify, Print Expense, Delete

3. At the **Request for MILPCS Settlement** screen, **click** on the desired **expense** appearing in the **Expenses Claimed** box and then **click** on the **Print Expense** button.
4. The **Print Setup** screen appears next. At this screen, ensure that the PC is configured to print to the appropriate printer. **Click** on the **OK** button when ready to print.

TDY Settlements

Entering TDY Request for Settlement

The **Request for TDY Settlement** screen consists of two sections:

- **Request** - This section is used to gather the administrative information.
- **Trips Taken** - This section is used to gather the claim specific details.

Completing the Request section:

1. **Type of Settlement** - At this field a listing of claim types appears. **Click** on the desired type to make a selection.
2. **Type of Partial** - At this field, a selection of various types of partial settlements can be made by clicking the buttons at the far right of the selection field. If the claim is not a partial settlement, press *Enter* or **click** on the selection **Not A Partial**.
3. **Pay to Credit Card Co.** - This feature is not operational at this time.
4. **Amt Previously Advanced** - This field is used to specify the amount of the TDY funds advanced to the traveler. If the advance was recorded in UTS prior to the processing of the settlement, that amount is displayed. Users may enter a higher amount if an additional amount was received and was not recorded in UTS. **Type** the dollar amount of the advance received or a different amount, if necessary.

5. **Accounting** - Click on the **Modify Acctng** button to access the Request **Accounting** screen.
6. **Remarks** - Click on the **Remarks** button to access the **Settlement Request Remarks** screen.

Completing the Trips Taken section:

At the **Trips Taken** section, any trips previously entered for the selected travel order are listed. The user may add a new trip if desired or view, modify, print or delete a previously entered trip.

The following links provide detailed instructions for performing the functions possible at the **Trips Taken** section.

See Also

[Entering Accounting](#)

[Entering Remarks](#)

[Adding a Trip](#)

[View or Modify a Trip](#)

[Printing a Trip](#)

[Deleting a Trip](#)

Adding a Trip

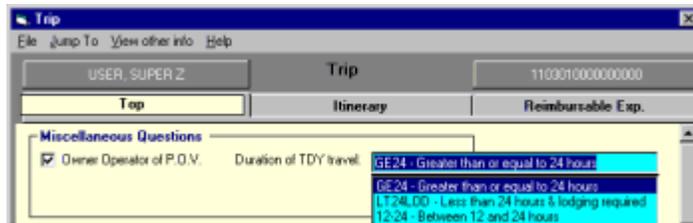
The transaction that calculates the TDY travel entitlement is referred to as a **Trip**. Normally, only one trip may be added to a Request for TDY Settlement. If the **travel order** that directed the travel is a **Blanket** order, however, **multiple** trips may be added to a particular Request for TDY Settlement claim.

Complete the following steps to Add a Trip to a Request for TDY Settlement:

1. Login to UTS. Afterwards, change the view to Traveler, or Proxy, if necessary.
2. Access the **Request for TDY Settlement** screen. Refer to the topic "[Creating Request for Settlement](#)" if additional instructions are needed.



3. At the **Request for Settlement** screen, **click** on the **Itinerary** button. The **Trip** screen will appear.
4. The **Trip** screen for a TDY settlement consists of three separate sections.
 - **Top** - This section is also referred to as the **Miscellaneous Questions** section. If the member was the owner or operator of the privately owned vehicle (POV), when one was used for the travel, then **click** on the **Owner Operator of POV** box.



At the **Duration of TDY Travel** field, a drop down listing appears displaying several choices representing the duration of the round trip. **Point** and **click** on the correct choice for the duration of the trip.

- **Itinerary** - This section captures the details for the travel portion of the TDY settlement claim. Please refer the topic “**Request for Settlement – Itinerary**” by **clicking** on the “**Itinerary**” link under the heading “**See Also**”.
 - **Reimbursable Expenses** - This section is used to capture any expenses that are not covered by per diem. Please refer the topic “**Request for Settlement - Reimb. Expenses**” by **clicking** on the “**Reimbursable Expenses**” link under the heading “**See Also**”.
5. After completing the Itinerary and Reimbursable Expenses sections, the user may need to access the **Exceptions** or **Occasional Expenses** screens to make changes or make addition input. **Click** on the **links** for these topics under the heading “**See Also**”, for additional information.
 6. After completing the **Trips** screen, **click** on the **Save** button.

See Also

[Itinerary](#)

[Reimbursable Expenses](#)

[Exceptions](#)

[Occasional Expenses](#)

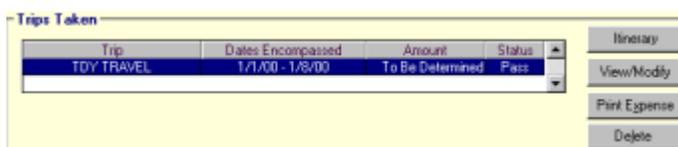
View or Modify a Trip

After a trip has been added to a Request for TDY Settlement, the trip may be **reviewed** for accuracy or may be **modified**, if necessary.

Note: The **Traveler** or **Proxy** cannot modify a request that was released to the **AO**, unless the AO returns the request to the Traveler.

Complete the following steps to View or Modify a TDY Trip:

1. Login to UTS. Afterwards, **change the view** to Traveler, or Proxy, if necessary.
2. Access the **Request for TDY Settlement** screen. Refer to the topic “**Modifying Request for Settlement**” if additional instructions are needed.



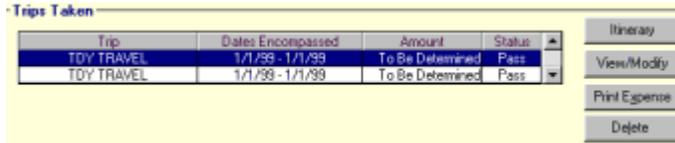
3. At the **Request for Settlement** screen, **click** on the desired trip appearing in the **Trips Taken** box and then **click** on the **View/Modify** button. The **Trip** screen appears.
4. **View** or **modify** the input screens as desired. If any **changes** were made, be sure to take the appropriate action to **save** the changes.

Printing a Trip

The details for a particular TDY **trip** may be printed by either the **Traveler, Proxy, or Authorizing Official**.

Complete the following steps to Print a TDY Trip:

1. Login to UTS.
2. Access the **Request for TDY Settlement** screen. Refer to the topic “**Modifying Request for Settlement**” if additional instructions are needed.



Trip	Dates Encompassed	Amount	Status
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass
TDY TRAVEL	1/1/99 - 1/1/99	To Be Determined	Pass

3. At the **Request for TDY Settlement** screen, **click** on the desired **trip** appearing in the **Trips Taken** box and then **click** on the **Print Expense** button.
4. The **Print Setup** screen appears next. At this screen, ensure that the PC is configured to print to the appropriate printer. **Click** on the **OK** button when ready to print.

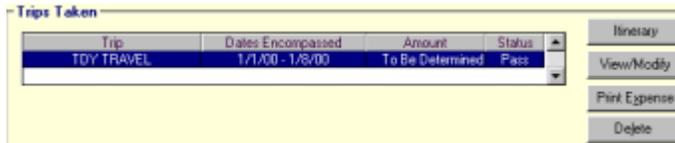
Deleting a Trip

After a trip has been added to a Request for TDY Settlement, the trip may be **deleted**, if necessary.

Note: The **Traveler** or **Proxy** **cannot** delete a trip associated with a request that was **released** to the **AO**, **unless** the **AO** **returns** the request to the **Traveler**.

Complete the following steps to Delete a TDY Trip:

1. Login to UTS in the **Traveler** or **Proxy** mode. **Change the view** to **Traveler**, or **Proxy**, if necessary.
2. Access the **Request for TDY Settlement** screen. Refer to the topic “**Modifying Request for Settlement**” if additional instructions are needed.



Trip	Dates Encompassed	Amount	Status
TDY TRAVEL	1/1/00 - 1/8/00	To Be Determined	Pass

-
3. At the **Request for Settlement** screen, **click** on the desired trip appearing in the **Trips Taken** box and then **click** on the **Delete** button. A pop-up appears asking if the entitlement should be deleted.



4. **Click** on the **Yes** button. After clicking the Yes button, the trip is no longer displayed in the **Trips Taken** box.
5. **Click** on the **Save** button at the bottom of the **Request for TDY Settlement** screen to complete the process.

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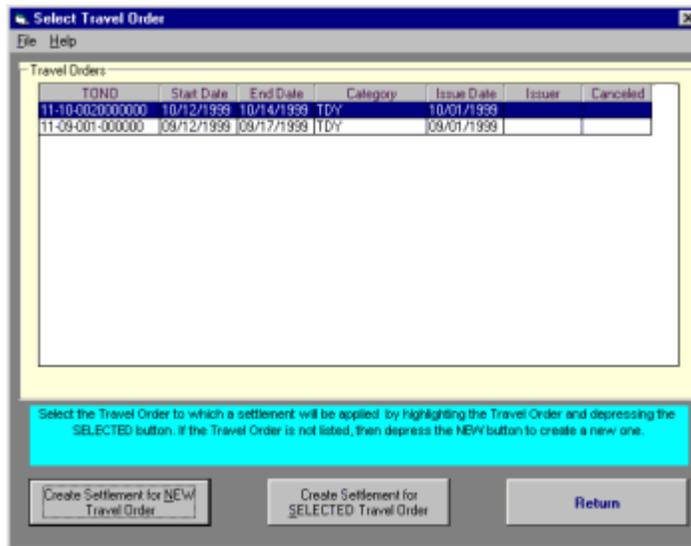
Supplemental Claims

Entering Supplemental TDY Claims

A Supplemental Claim must be processed when the original claim has been already been processed and exported to the computation system (IATS) to be computed and disbursed. This procedure is necessary when an error was made on the original settlement or information was omitted. When a supplemental claim is processed, the total entitlement is recalculated. The difference is then either paid to or collected from the traveler.

Complete the following steps to process a Supplemental TDY Claim - Traveler View:

1. Login to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for TDY Travel Settlement** screen:
 - **Method 1:** - Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler Order** screen appears.
 - **Method 2:** - Click on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.

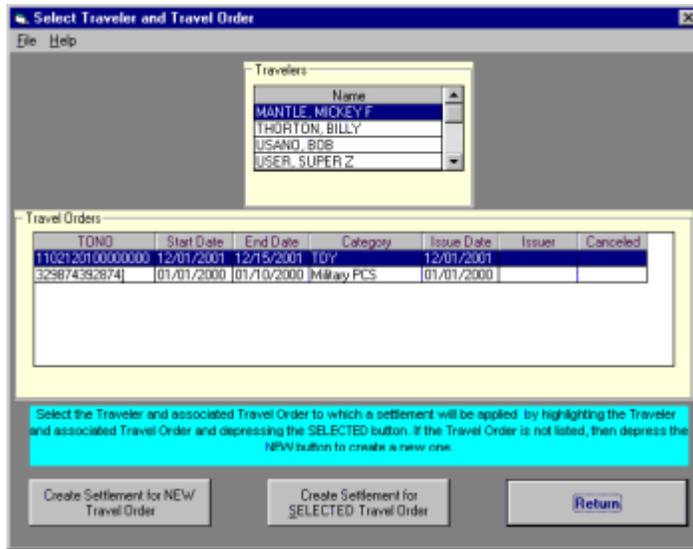


3. At this screen **point** and **click** on the desired order displayed in the table and then **click** the **Create Settlement for Selected Order** button.
4. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for TDY Settlement** screen appears. Notice that **Supplemental** is now displayed at the **Type of Settlement** field.

5. In the **Trips Taken** section, ensure that the correct trip is highlighted, then **click** the **View/Modify** button.
6. The **Trip** screen appears displaying the itinerary originally entered.
7. Make any required changes to the various sections of the **Trip** screen.
8. When finished, **save** the claim and **send** it to the **AO** for approval.

 **Complete the following steps to process a Supplemental TDY Claim - Proxy View**

1. Login to UTS as a **Proxy** or **change the view** to Proxy if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for TDY Travel Settlement** screen:
 - **Method 1:** - Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.
 - **Method 2:** - Click on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.



3. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name** and any travel authorizations or travel orders that have already been created will appear in the **Travel Orders** table.
4. **Point** and **click** on the desired order displayed in the Travel Orders table and then **click** the **Create Settlement for Selected Order** button.
5. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for TDY Settlement** screen appears. Notice that **Supplemental** is now displayed at the **Type of Settlement** field.
6. In the **Trips Taken** section, ensure that the correct trip is highlighted, then **click** the **View/Modify** button.
7. The **Trip** screen appears displaying the itinerary originally entered.
8. Make any required changes to the various sections of the **Trip** screen.
9. When finished, **save** the claim and **send** it to the **Traveler** or the **AO** for approval.

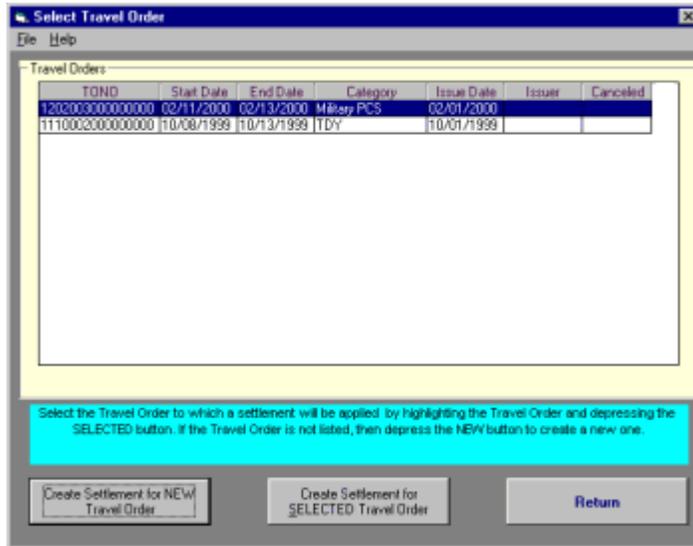
Entering Supplemental MILPCS Claims

A Supplemental Claim must be processed when the original claim has been already been processed and exported to the computation system (IATS) to be computed and disbursed. This procedure is necessary when an error was made on the original settlement or information was omitted. When a supplemental claim is processed, the total entitlement is recalculated. The difference is then either paid to or collected from the traveler.

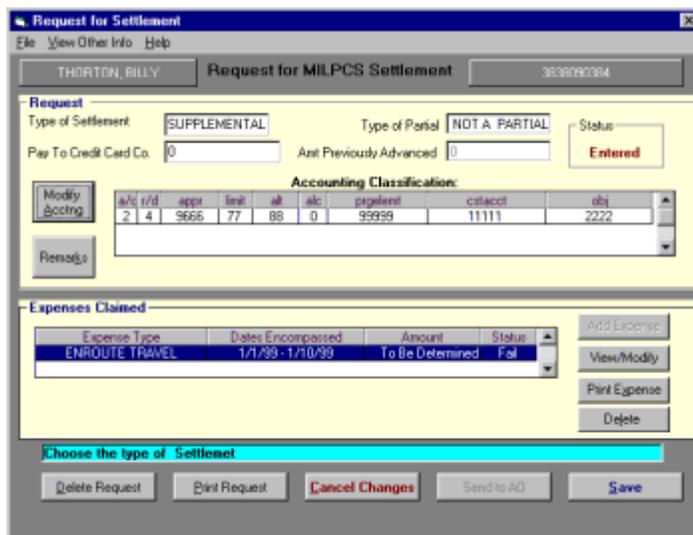
Complete the following steps to process a Supplemental MILPCS Claim - Traveler View:

1. Login to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for MILPCS Travel Settlement** screen:

- **Method 1:** - Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler Order** screen appears.
- **Method 2:** - Click on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Travel Order** screen appears.



3. At this screen **point** and **click** on the desired order displayed in the table and then **click** the **Create Settlement for Selected Order** button.
4. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for MILPCS Settlement** screen appears. Notice that **Supplemental** is now displayed at the **Type of Settlement** field.

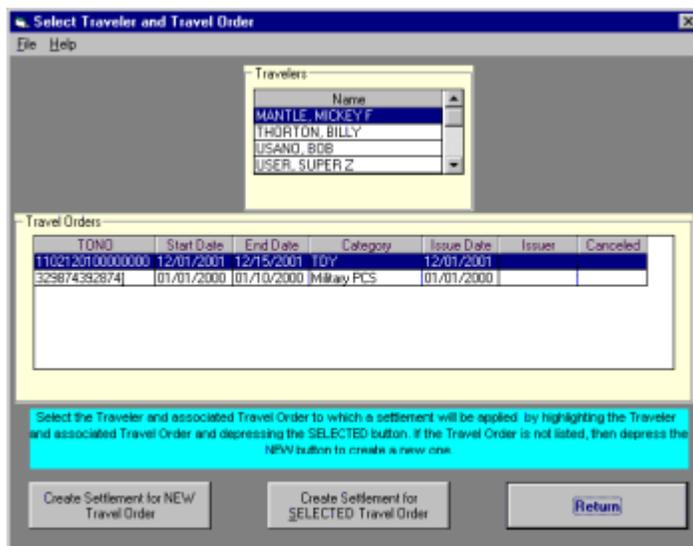


5. In the **Expenses Claimed** section, ensure that the correct expense is highlighted, then **click** the **View/Modify** button.
6. The **Trip** or **TLE/TLA Allowance** screen appears, depending on the type of expenses selected, and displays the itinerary or expenses originally entered.

7. Make any required changes to the selected expense.
8. When finished, **save** the claim and **send** it to the **AO** for approval.

 **Complete the following steps to process a Supplemental MILPCS Claim - Proxy View**

1. Login to UTS as a **Proxy** or **change the view** to Proxy if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Request for MILPCS Travel Settlement** screen:
 - **Method 1:** Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.
 - **Method 2:** Click on the **File** menu and then **point** on the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for 1351-2 Settlement** and the **Select Traveler and Travel Order** screen appears.



3. At this screen, the **Travelers** table lists all of the Travelers the Proxy can perform services for. **Click** the desired Traveler's **name** and any travel authorizations or travel orders that have already been created will appear in the **Travel Orders** table.
4. **Point** and **click** on the desired order displayed in the Travel Orders table and then **click** the **Create Settlement for Selected Order** button.
5. After clicking the **Create Settlement for Selected Order** button or creating a new order, the **Request for MILPCS Settlement** screen appears. Notice that **Supplemental** is now displayed at the **Type of Settlement** field.
6. In the **Expenses Claimed** section, ensure that the correct **expense** is highlighted, then **click** the **View/Modify** button.
7. The **Trip** or **TLE/TLA Allowance** screen appears, depending on the type of expenses selected, and displays the itinerary or expenses originally entered.
8. Make any required changes to the selected expense.

-
9. When finished, **save** the claim and **send** it to the **Traveler** or the **AO** for approval.

Local 1164 Travel

About Local 1164 Travel

Local Travel occurs when a traveler performs temporary duty within the designated **local travel area** of their official duty station. Local Travel is claimed on **Standard Form 1164** and under this circumstance, no per diem is payable. Typically, the traveler is reimbursed for local travel expenses, such as, **mileage, parking, tolls, fares**, etc. In addition, some travelers may even be authorized reimbursement for occasional meals and lodging.

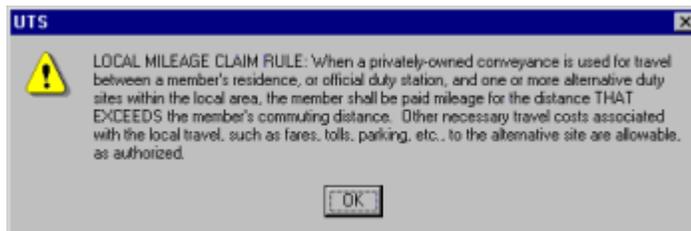
Creating Local 1164 Travel Claim

The steps involved in creating a **Local 1164 Travel Claim** depend on which of the following **View** modes is used:

- **Traveler**
- **Proxy**
- **Signature Proxy**

Creating Local 1164 Travel Claim - Traveler View

1. Login to UTS as a **Traveler** or **change the View** to Traveler if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Local Travel - 1164** screen:
 - **Method 1:** - Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for Local 1164 Settlement**.
 - **Method 2:** - Click on the **File** menu and then **point** at the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Request for Local 1164 Settlement**.
3. After using one of these two methods, the **Local Mileage Claim Rule** screen appears. After reviewing this rule, **click OK** to continue.



4. After clicking on **OK** at the Local Mileage Claim Rule screen, the **Local Travel - 1164** screen appears.

5. Make the required input to complete this screen. Refer to the topic, “**Entering Local 1164 Claim**”, listed below under the heading “**See Also**” for additional instructions.

Creating Local 1164 Travel Claim - Proxy View

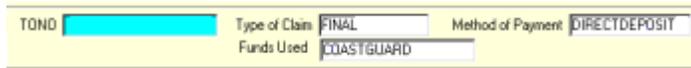
1. Login to UTS as a **Proxy** or **change the View** to Proxy if necessary.
2. At the **UTS Request Status** screen, there are two ways to access the **Local Travel - 1164** screen:
 - **Method 1:** - Click on the **Fill out** button. A drop down menu appears listing a variety of travel actions. Click on **Request for Local 1164 Settlement**.
 - **Method 2:** - Click on the **File** menu and then **point** at the **Create** option. A drop down menu appears listing a variety of travel actions. Click on **Local 1164**.
3. After using one of these two methods, the **Select Traveler** screen appears.
4. At this screen, **point** and **click** on the desired **traveler’s name** to make a selection, then **click** the **Create Local 1164 for Selected Traveler** button.
5. After clicking on the **Create Local 1164 for Selected Traveler** button, the **Local Mileage Claim Rule** screen appears. After reviewing this rule, **click** on **OK** to continue.
6. After clicking on **OK** at the Local Mileage Claim Rule screen, the **Local Travel - 1164** screen appears.
7. Make the required input to complete this screen. Refer to the topic, “**Entering Local 1164 Claim**”, listed below under the heading “**See Also**” for additional instructions.

See Also

[Entering Local 1164 Claim](#)

Entering Local 1164 Claim

-  **Complete the Local Travel - 1164 screen by entering the required information at each input field. Press Tab, Enter, or point and click to advance through the various fields.**



TONO [] Type of Claim: FINAL Method of Payment: DIRECTDEPOSIT
Funds Used: COASTGUARD

- **TONO** - Type the **travel order number** for the Local 1164 claim being created.
- **Type of Claim** - At this field, a drop down listing appears displaying **Final** or **Supplemental**. If entering this claim for the first time, **click** on **Final**. If this claim has been entered previously, but is being submitted for re-computation, **click** on **Supplemental**.
- **Method of Payment** - At this field, a drop down listing appears displaying **Check** and **Direct Deposit**. The default value is **Direct Deposit**. If this is the correct method of payment, press **Enter** to continue. If not, **click** on **Check**.
- **Funds Used** - At this field, a drop down listing appears displaying various funding organizations. **Point** and **click** on the desired organization to make a selection.



Local Expenses			
Date	Type Of Expense	Claimed	Location
10/04/1999	FARE OR TOLL	35	
▶ 10/04/1999	MILEAGE	25	
	MILEAGE		
	PHONE/TELEGRAPH		
	FARE OR TOLL		
	MORNMEAL - Breakfast		
	NOONMEAL - Lunch		

Delete Expense | edit new Expense

- **Date** - At this field, **type** the **date** of the first expense being requested for the period of the claim.
- **Type of Expense** - At this field, a drop down listing appears displaying a variety of the typical expenses associated with Local Travel claims. **Point** and **click** on the desired expense type or **type a description** if the expense being claimed is not listed.
- **Amount/Miles Claimed** - At this field, enter the dollar **amount** being claimed for the selected expense or the number of **miles** if the expense type is **Mileage**.

When finished entering expenses, complete this screen by adding the **accounting** appropriation and any desired **remarks**.

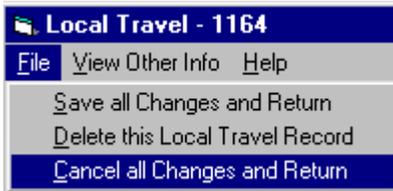
See Also

- [Inserting Expense](#)
- [Deleting Expense](#)
- [Entering Accounting](#)
- [Entering Remarks](#)
- [Canceling Local 1164 Claim](#)
- [Saving Local 1164 Claim](#)
- [Releasing Local 1164 Claim](#)
- [Printing Local 1164 Claim](#)
- [Deleting Local 1164 Claim](#)
- [Viewing Local 1164 Claim](#)

Canceling Local 1164 Claim

If the initial input or current changes to an 1164 claim have not been saved, there are two ways to **cancel a Local 1164 Claim** or the **changes** being made:

1. **Click** the **Cancel** button at the bottom of the **Local Travel - 1164** screen.
2. **Click** on the **File** menu at the top of the **Local Travel - 1164** screen, then **click** on the **Cancel all Changes and Return** option.



Note: If the Request for Local 1164 Settlement has been saved previously, the **Delete** option must be used to completely remove the request.

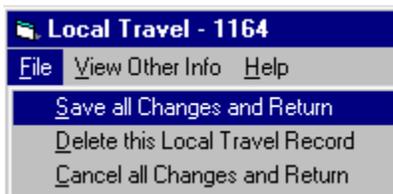
See Also

[Deleting Local 1164 Claim](#)

Saving Local 1164 Claim

After completing the required input at the **Local Travel - 1164** screen, there are two ways to **save a Local 1164 Claim**.

1. **Click** the **Save** button at the bottom of the **Local Travel - 1164** screen.
2. **Click** on the **File** menu at the top of the **Local Travel - 1164** screen, then **click** on the **Save all Changes and Return** option:



3. UTS will save the claim and return the user to the **UTS Request Status** screen.

Releasing Local 1164 Claim

Local 1164 Claims can be **released** by either the **Traveler** or the **Signature Proxy**. In addition, there are two methods that can be used.

Use one of the following methods to Release a Local 1164 Claim:

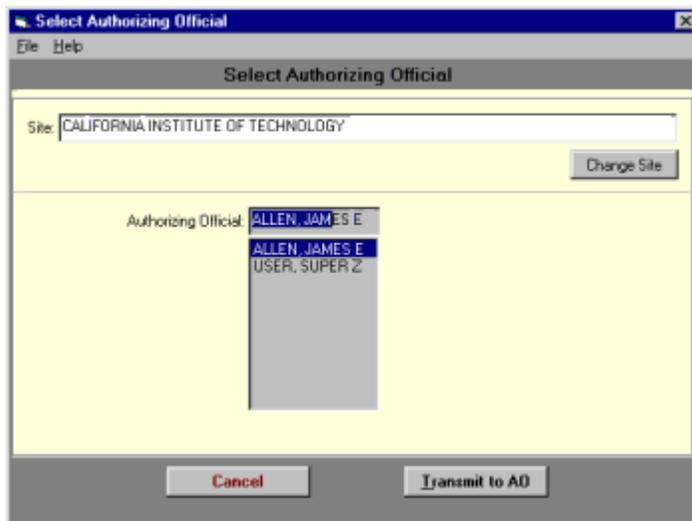
- **Method 1:** - Click the **Send to AO** button at the bottom of the **Local Travel - 1164** screen.



- **Method 2:** - **Point** and **click** on the desired **Local 1164 Claim** listed at the **UTS Request Status** screen, then **click** the **Send to Auth** button.



1. After using one of the (2) **Release** options, the **Select Authorizing Official** screen appears requiring the user to select an **AO**.

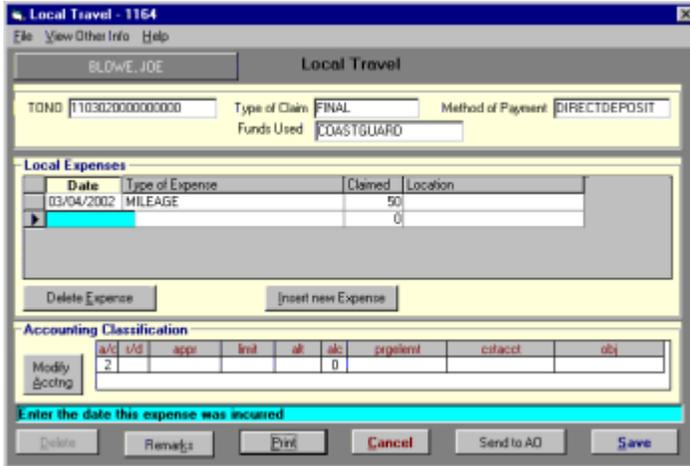


2. At the **Select Authorizing Official** screen, the name of the traveler's unit will be displayed at the **Site** field and the designated Authorizing Officials are listed below. If the correct AO is listed **click** on the desired name, then **click** on the **Transmit to AO** button. The user can also **click** on the **Change Site** button to select a different unit and see a list of Authorizing Officials for the newly selected unit, if necessary.
3. After selecting an **AO**, a pop-up appears requiring the entry of a **Confirmation Password**. This is the **Secondary Password** that was created when the user's **Personal Profile** was created.
4. After entering the confirmation password, UTS **forwards** the transaction to the **AO** and **displays** the **UTS Request Status** screen..

Printing Local 1164 Claim

 Complete the following steps to print a Local 1164 Claim:

1. Click the **Print** button at the bottom of the **Local Travel 1164** screen.

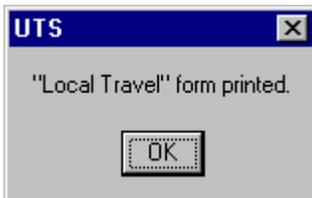


Date	Type of Expense	Claimed	Location
03/04/2002	MILEAGE	90	
		0	

2. After the **Print** button is clicked, the **Print Setup** screen appears. Verify that the PC is configured for the correct printer or make any necessary changes. When satisfied that the correct printer information is displayed, click the OK button.



3. UTS begins printing the 1164 form and displays a pop-up indicating that the form has been printed.

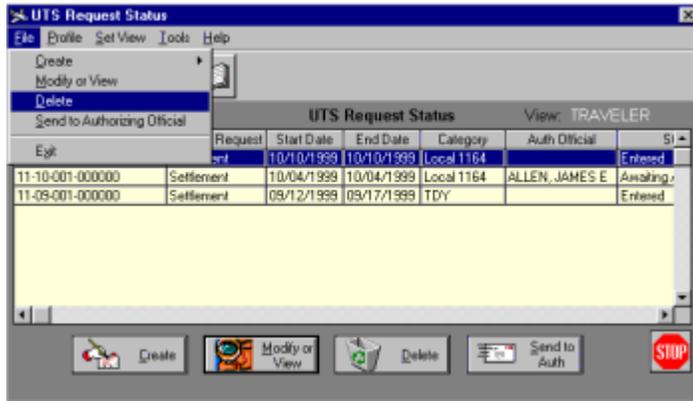


4. Click the **OK** button to continue.

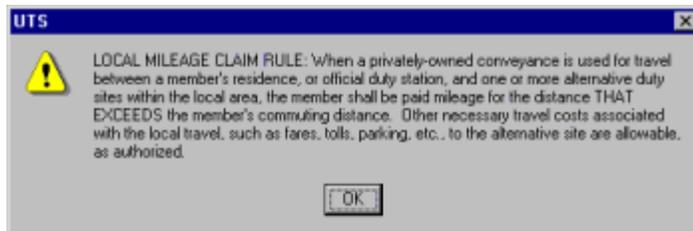
Deleting Local 1164 Claim

There are several ways to **delete** a **Local 1164 Claim**. The method to use, however, depends on which input screen is currently displayed.

 **Complete the following steps to delete a Local 1164 Claim:**



1. Login to UTS. Afterwards, **change the view** to Traveler or Proxy, if necessary.
2. At the **UTS Request Status** screen, there are three methods for deleting a Local 1164 claim:
 - **Method 1:** - **Point** and **click** on the desired Local 1164 claim listed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Delete** option. A pop-up appears asking if you are sure you wish to delete this claim. **Click** on **Yes**.
 - **Method 2:** - **Point** and **click** on the desired Local 1164 claim listed in the Claims List. After selecting a claim, **click** the **Delete** button. A pop-up appears asking if you are sure you wish to delete this claim. **Click** on **Yes**.
 - **Method 3:** - **Point** and **click** on the desired Local 1164 claim listed in the Claims List. After selecting a claim, **click** the **Modify or View** button. After clicking the Modify or View button, the **Local Mileage Claim Rule** screen appears.



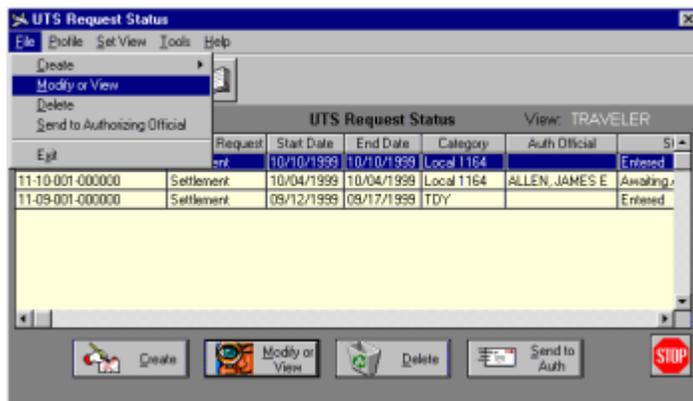
After reviewing this rule, **click** on **OK** to continue and the **Local Travel - 1164** screen appears. At this screen, **click** the **Delete** button. A pop-up appears stating **Deleting this Request?** **Click** on **Yes**.

Viewing Local 1164 Claim

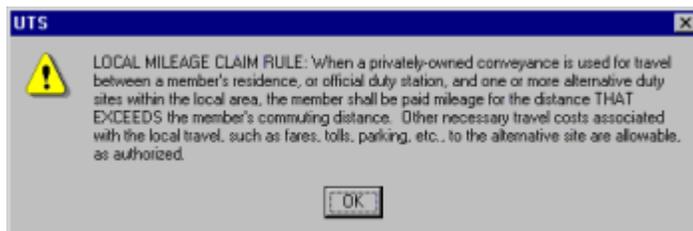
On occasion, it may be necessary to **View** a **Local 1164 Claim** that has been created and saved.

Use one of the following methods to View a Local 1164 Claim:

1. Login to UTS.
2. At the **UTS Request Status**, or **UTS Requests Requiring Action** screen, there are two methods for viewing the **Local Travel - 1164** screen:
 - **Method 1:** - **Point** and **click** on the desired Local 1164 Claim listed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Modify or View** option.



- **Method 2:** - **Point** and **click** on the desired Local 1164 Claim listed in the Claim List. After selecting a claim, **click** the **Modify or View** button.
3. After using either of the two methods, the **Local Mileage Claim Rule** screen appears.



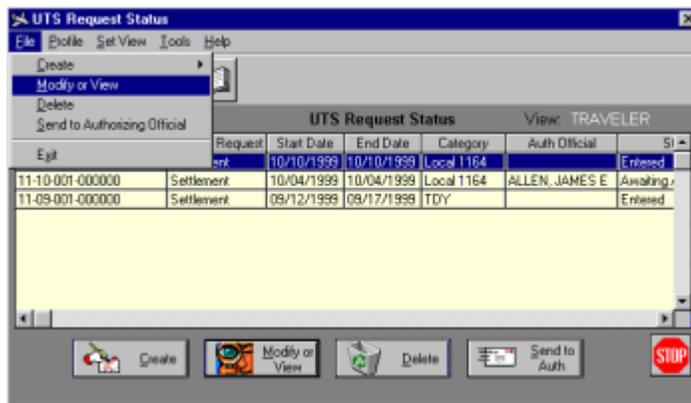
4. After reviewing this rule, **click** on **OK** and the **Local Travel - 1164** screen appears.
5. When finished **Viewing** the claim, **click** the **Save** button, the **Cancel** button, or the **X** in the top right hand corner of the **Local Travel - 1164** screen, and answer **Yes** at the **Cancel this screen** pop-up.

Modifying Local 1164 Claim

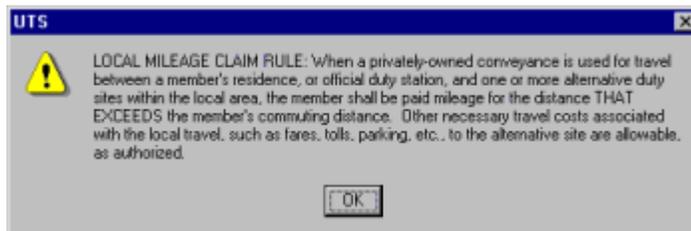
On occasion, it may be necessary to **Modify** a **Local 1164 Claim** that has been created and saved.

Use one of the following methods to Modify a Local 1164 Claim:

1. Login to UTS.
2. At the **UTS Request Status**, or **UTS Requests Requiring Action** screen, there are two methods for viewing the **Local Travel - 1164** screen:
 - **Method 1:** - **Point** and **click** on the desired Local 1164 Claim listed in the Claims List. After selecting a claim, **click** the **File** menu and then select the **Modify or View** option.



- **Method 2:** - **Point** and **click** on the desired Local 1164 Claim listed in the Claims List. After selecting a claim, **click** the **Modify or View** button.
3. After clicking on the **Modify or View** button, the **Local Mileage Claim Rule** screen appears.



4. After reviewing this rule, **click** on **OK** to continue and the **Local Travel - 1164** screen appears.
5. At the **Local Travel - 1164** screen, press **Enter** or **Tab** to advance through the input fields, or **point** to the desired field and **click** the **left** mouse button. **Type** the required change or **select** a new option as needed.
6. After making the desired changes, **click** the **Save** button.

See Also

- [Inserting Expense](#)
- [Deleting Expense](#)
- [Entering Accounting](#)
- [Entering Remarks](#)

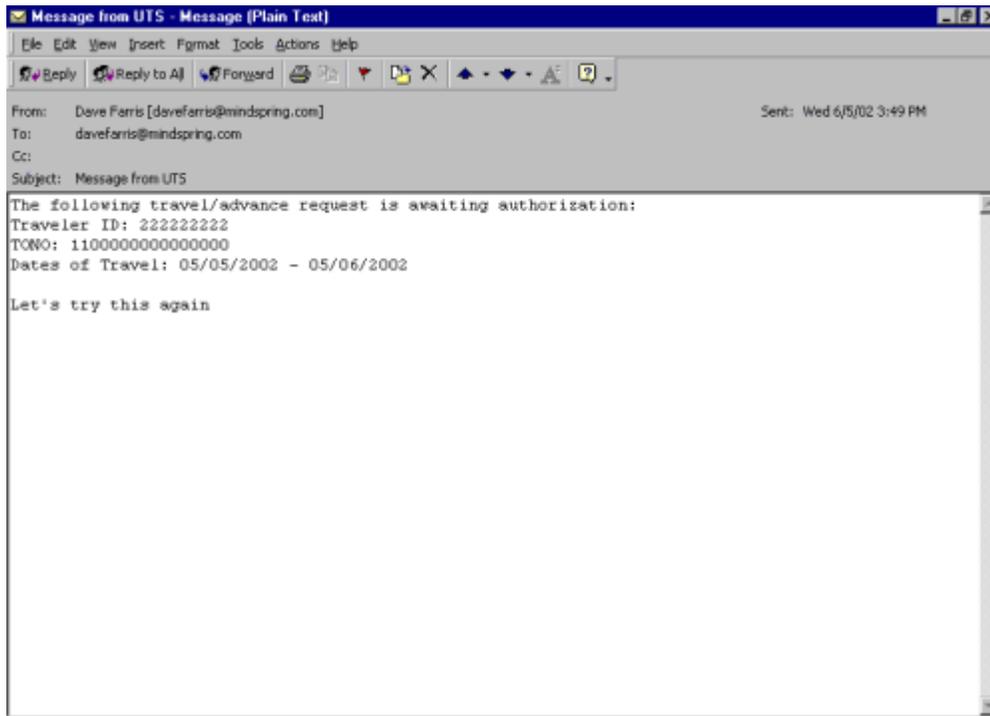


UTS-Email

About UTS-Email

A new feature has been added to UTS that allows a **Traveler, Proxy** or **AO** to send an **E-mail** message to each other to notify the recipient that a **Request for Authorization, Settlement**, or **Advance** was forwarded. When this new feature is used, UTS **automatically** generates an E-mail message containing information pertaining to the **Traveler's ID, Travel Order Number** and the **Trip Dates**.

In addition, the user may also include a **Personal Email Message** if additional information is needed. UTS automatically appends this message to the system-generated message when a **Request for Authorization, Settlement**, or **Advance** is forwarded.



See Also

[Set-up Email Address](#)

[Create Personal Message](#)

[Sending Email](#)

Set-up Email Address

In order to use the UTS feature to receive an Email message, an Email **address** must be entered into the **Additional Information** section of the **Personal Profile**.

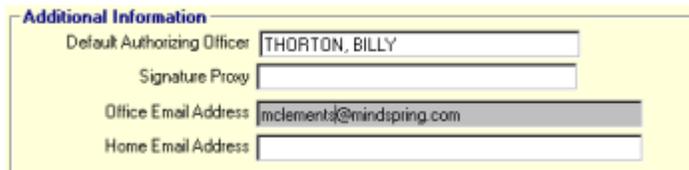
Note: This task can be performed by a user in the **Traveler** view mode only.

Complete the following steps to enter an Email address:

1. Login to UTS as a **Traveler** or **change the view** to Traveler if necessary.
2. At the **UTS Request Status** screen, **click** on the **Profile** menu.



3. At the **Profile** drop down menu, **click** on the **Modify or View Profile** option.
4. At the **Personal Profile** screen, **click** on the **Security** button. The **Security Information** screen appears.
5. At the **Personal Profile** screen, **click** on the **Security** button. The **Security Information** screen appears.
6. At the **Security Information** screen, **click** in the **Office Email Address** field in the **Additional Information** section.

A screenshot of the 'Additional Information' section of the 'Security Information' screen. The section has a yellow background. It contains four text input fields with labels to their left: 'Default Authorizing Officer' (with the value 'THORTON, BILLY'), 'Signature Proxy', 'Office Email Address' (with the value 'mclements@mindspring.com'), and 'Home Email Address'.

7. Type the traveler's **Office Email Address** in this field.
8. After completing the Office Email Address field, **click** the **Previous Screen** button.
9. At the **Personal Profile** screen, **click** the **Save** button to save the Email address entries.

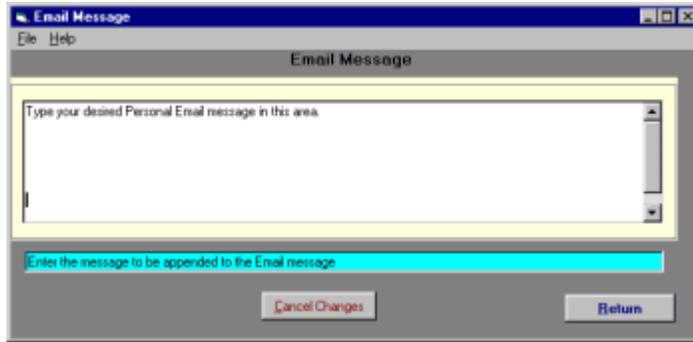
Create Personal Message

A new feature has been added to UTS that allows a **Traveler, Proxy** or **AO** to send an **E-mail** message to each other to notify the recipient that a **Request for Authorization, Settlement**, or **Advance** was forwarded. When this new feature is used, UTS **automatically** generates an E-mail message containing information pertaining to the **Traveler's ID, Travel Order Number** and the **Trip Dates**.

In addition, the user may also include a **Personal Email Message** if additional information is needed.

Use one of the following methods to send a Personal message:

- **Method 1:** - **Point** and **click** on the **Tools** menu, if displayed, and then select the **Create an Email Message** option.
 - **Method 2:** - **Point** and **click** on the **Envelope** icon located at the top of the **UTS Request Status** or **UTS Request Requiring Action** screen just below the **menu bar**.
1. After using method **1** or **2** above, the **Email Message** screen appears.



2. At this screen, **type** the desired Personal Email message. UTS will add the text entered to the system-generated Email message when a **Request for Authorization, Settlement, or Advance** is forwarded.
3. After typing a Personal message, **click** the **Return** button to return to the previous screen.

Sending Email

If an Email **address** has been set-up for the intended **recipient** in the UTS database, UTS automatically creates and sends the Email message at the time the **Request for Authorization, Settlement, or Advance** is forwarded. No additional action is necessary.

See Also

[About UTS Email](#)

[Set-up Email Address](#)

[Create Personal Message](#)

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